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**Analysis of the Progress of Lifelong Learning Strategies of Portuguese  
Economics and Management Schools**

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**Analysis of the Progress of Lifelong Learning Strategies of Portuguese  
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**Abstract:**

Lifelong learning (LLL) is becoming increasingly relevant to today's society, not only to individuals, but also to higher education institutions (HEIs). This is due to the fact that external forces such as globalization and technological change are pressuring individuals to constantly update their knowledge, and HEIs, to respond to societal and market demands. To engage in LLL strategizing HEIs have to overcome some barriers while at the same time assure the response to labor market and students' needs. Therefore, more and more HEIs have to engage in strategy making in a way more similar to the one of business world. Portuguese HEIs are facing even greater external forces' pressure due to the economic crisis the country is going through, which has implied state funding cuts but also low available income to families.

The main aim of this master thesis was to study empirically the LLL strategy content and process of Portuguese economics and business schools and departments. This was assessed through semi-structured interviews performed to the schools. Further, there was the aim to understand the perspective over LLL of potential students as it affects the LLL strategy making, and, so, would be valuable in the provision of recommendations to the schools. This was assessed through a survey. The study allowed the conclusion that there is an increasing market-orientation from the schools, and a stakeholder-orientation, with increasing relevance given to corporate partners, Alumni and students' opinion.

**Keywords:** LLL strategies; Higher Education Institutions' strategies; Portuguese Higher Education; Portuguese Higher Education Institutions' strategies; Portuguese Economics and Business schools LLL strategies.

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## **Introduction**

Learning has a positive impact in the personal and professional lives of the ones who pursue it, but also on society as a whole (Machado-Taylor, 2011). Learning is becoming increasingly important in today's knowledge society where aspects such as globalization, demographic trends and technological change require individuals to constantly update and upgrade their skills. Constant acquisition and updating of skills is required so that people are able to fulfill professional demands, as the labor market's continuous changes make the skills possessed rapidly obsolete. But, it is also necessary for individuals to continue to participate in social and cultural activities throughout life (Merriennboer et al., 2009).

The benefits to the society as a whole are obtained through economic growth, which is fostered by high levels of education of its individuals, which contribute to improve economic competitiveness, productivity and levels of employment (OECD, 2007a).

In this context, lifelong learning gains increasing relevance, as people will have to learn throughout their lives, either in formal or informal settings, to participate in work-related and/or community tasks. Hence, individuals and organizations need to be informed not only of the benefits and of the need to learn throughout life, but also of the diversity of opportunities available for them to improve their knowledge (Merriennboer et al., 2009).

Higher education institutions (HEIs), due to their role in generating and disseminating knowledge, should have a relevant role in providing and promoting lifelong learning initiatives (Pires, 2009), as well as, in communicating them in a manner that the information reaches the target in the most tailored way (Pausits, 2007). In this way HEIs will not just be responsive to societal needs, but also enlarge the group of people aware of this need to update skills. To engage in LLL provision, HEIs will also face several challenges. They need to recognize prior learning, adapt their structure to permit increasing transversal movements across fields of study, and adapt the programs, making them more flexible to, through, for example, the transmission of content through virtual settings, guarantee the satisfaction of the needs of very different learners.

Along with this, HEIs should also assure that there is a fit between the knowledge provided and the one that is searched for by the labor market, ensuring high



employability, enforce their internationalization process and ensure quality recognition (Machado-Taylor, 2011).

This increasing influence of the external environmental forces over HEIs requires them to engage in strategy making in a way more similar to the one of the business world (Machado-Taylor, 2011).

HEIs' strategy elaboration should contemplate lifelong learning provision, either through inclusion of LLL in the overall strategy or the creation of a separate LLL strategy (Popescu, 2012).

Indeed, the elaboration of LLL strategies has been increasingly taken into consideration by higher education providers, namely universities, with various European institutions, such as EUCEN, elaborating frameworks and studies that attempt to help them in this task (de Viron, Feutrie and Filloque, 2011a). The European commission also recognized the need for consistent lifelong learning strategies (Pires, 2009).

These strategies elaboration is highly influenced by the organizational culture, institutional governance, but also, by the external context, where there are included the demand of the market, but also incentives and targets defined by European institutions. Therefore, each HEI should develop a strategy that takes into consideration internal and external aspects, trying to leverage the strengths in order to take advantage of the opportunities, and to overcome the threats, so that it continues to be successful in the today's globalized higher education market.

Portugal is going through a severe economic crisis, which has conducted to numerous cuts in public expenditure, namely to cuts in universities budgets and loans provided to students, but also, to a raise in taxes, and to high unemployment levels. So, Portuguese HEIs and students are confronted with several challenges posed by alterations in political, economical, technological, socio-cultural and demographic factors (Blatter et al., 2013). Lifelong Learning may be the answer to those challenges, as providing new learning opportunities may be an additional revenue source for HEIs, and updating of skills a way for students to overcome unemployment or improve career prospects.

It is possible to understand that Portuguese HEIs are increasingly offering opportunities for further learning throughout life, with an increase in the number of

post-graduate offerings, such as masters, PhDs and MBAs (Pires, 2009). However, the LLL strategies vary among HEIs.

This master thesis aimed to study empirically the strategy content and process in terms of Lifelong Learning of Portuguese economics and business schools, and departments and to provide recommendations to HEIs practitioners. This was based on interviews made to six Portuguese Economics and Management Schools and Departments, on the collection of secondary data and on a survey made to potential customers of those HEIs to understand their perspective over several aspects such as characteristics of the offerings, and willingness to engage and pay for each offering. Two transversal analyses of all the schools or departments studied were performed, analyzing the main aspects in terms of strategy content and of the way of doing strategy in the Portuguese context. The methodology chosen was based on the one of ALLUME Project of EUCEN. Following, recommendations were provided, taken into consideration not only the interviews, but also the survey.

The choice of the theme was mainly based on the interest for the strategy of educational providers that is changing to become more similar to the one of enterprises. Besides, as a Portuguese student it was possible to verify that institutions are facing increasing pressure of decreasing State budgets and of an increasing number of people in doubt of engaging in higher education due to financial constraints or because the prospective of employment afterwards is more and more uncertain. However, in some cases it is also seen as a way to avoid unemployment or overcome it.

This master thesis has the structure that will be further described. Firstly, in the literature review are put forward the strategic frameworks that help to analyze the strategic information presented by the schools, namely the strategy-as-practice approach (Whittington, 2003), Grant's approach to strategy (Grant, 2010), as in that model the need to assess internal and external context is considered, and then possible strategies for lifelong learning. Following, in this same chapter, are put forward models of organizational culture and of institutional governance, which influence the main actors and decision-makers of the schools, and then strategic tools and techniques, which are useful for the actors to take and base their decisions, as well as, the value shop model of Stabell and Fjeldstad (1998), which allows the identification of activities of strategic importance (Stabell and Fjeldstad, 1998).

In the next chapter, the methodology, are presented the research methods used, the population sample and are detailed the objectives to be achieved with this study.

Afterwards, it is presented the chapter with the in-depth analysis of the context and presentation of the case studies, where it is analyzed the context, in which, the Portuguese Schools are inserted in, with an examination of the Portuguese Higher Education environment, and where the internal environment of each school is analyzed according to the Grant's approach for internal environment analysis (Grant, 2010). This is followed, by the presentation of the results, with two transversal analyses of the information collected in the interviews and secondary data, by the survey's results, by the discussion of all the results previously mentioned and by recommendations. Finally, it is presented a conclusion of the whole study, including also suggestions for further research in the area.

## **Chapter 1: Literature Review**

In this critical review of the literature various strategic frameworks will be put forward, as well as, aspects concerning the state of play of LLL in Europe, as they will be valuable to analyze universities' schools and departments LLL strategies.

### **1.1 Strategic Frameworks**

The first part of the literature review will be dedicated to the understanding of the various strategic approaches.

#### **1.1.1 Strategic Analysis**

Firstly, it will be examined the four strategies features that make strategies successful according to Robert Grant (2010). Those features are “simple and consistent long-term goals, profound understanding of the competitive environment, objective appraisal of resources and effective implementation” (Grant, 2010).

According to this framework, strategic analysis should comprise both industry environment and firm environment. The first one refers to the relations between suppliers, customers and competitors, which are affected by external environmental factors (political, economic, social and technological factors). These external environmental factors have to be analyzed considering their impact on the previous mentioned relationships. The second one encompasses *goals and values, structures and systems* and *resources and capabilities*. Therefore, to assure strategic fit, internal and external factors have to be analyzed, as they may be drivers and constraints to a given strategic decision. Besides, effective implementation is also a requisite to have a successful strategy (Grant, 2010).

This framework will be valuable in the study, particularly to contextualize and define the actual situation of universities' schools and departments. The aim is to characterize higher education institutions based on their physical, intangible and human resources, define their current business and examine the external context in

which they are inserted and the way it affects its relationships with the various stakeholders and so their strategic decisions.

### **1.1.2 Higher Education Institutions' Strategies**

The strategic management process is considered the most adequate management approach to higher education institutions, considering that they are increasingly exposed to a competitive environment similar to the one faced by firms. In this way, strategic management is valuable, as it allows for market orientation through the consideration of external factors, and flexibility by contemplating the need for change (Martin, 1992).

So, HEIs should make strategic decisions taking into consideration the resources available and the way those can be applied to better respond to external demands.

### **1.1.3 Lifelong Learning Strategies**

A Lifelong Learning (LLL) strategy' design should follow the frameworks previously presented. Various LLL strategies can be drawn by HEIs.

LLL strategies will be defined according to a classification drawn by Ellen Brandt (2002) for Norwegian universities: research news for professionals, same content with flexible delivery, adapted specialization, interdisciplinary master's degrees, interdisciplinary courses for new markets, and tailor-made on commission (Brandt, 2002).

The first strategy consists of non-credit courses for professionals as a way for them to constantly update their knowledge. This type of offering is not often widely publicized. The second one consists of the adaptation of the initial education offerings into continuing education offerings through the usage of more flexible modes of delivery. The third one consists also in the adaptation of courses, but in this case, it is the adaptation in terms of content and mode of delivery, of specialized courses that are already offered at the graduate level. The fourth one consists of graduate level courses that conduct to a master's degree. The fifth one consists of the development of courses that concede credits, are targeted to very specific groups and may regard specific issues relevant at a given time, for example environmental issues. The last

one consists of the development of a specific program for a specific customer, for example an employer that wants a specific course(s) to be taught to its employees (Brandt, 2002).

It will be assessed whether economics and management schools follow one or more of these strategies. However, there are some particular aspects of the relationship of LLL strategies with the overall strategy that should be mentioned.

#### **1.1.4 Stages of integration of LLL strategy**

Therefore, it is also important to refer that it can be identified three stages of integration of a LLL strategy in universities. These stages will be defined according to a classification put forward by Smidt and Sursock (2011): adaptation stage, organizational stage and cultural stage. The first stage is characterized by the design and communication of a LLL strategy that, however, remains separate from the strategy concerning the traditional activities, existing no explicit definition of LLL. In the second stage there is a greater integration of the LLL strategy into the overall strategy, with the creation of support services and an increasing adaptation of programs to attract a broader target that includes not only traditional students but also more mature students. In the third stage, which is characterized by a greater participation of all stakeholders in LLL, activities are learner-centered, staff has the possibility to take LLL activities, and there is research in the field (Smidt and Sursock, 2011).

The elaboration of a LLL strategy is a challenging task that demands a great commitment of resources, namely time, and so requires that the university recognizes the benefits that LLL may bring before engaging in it. Therefore, previously to developing a LLL strategy, a university may commence with a pilot project in a school with adequate conditions, or gradually enlarge LLL provision throughout the university (de Viron, Feutrie, Filloque, 2011b).

LLL strategies should not be elaborated in a responsive manner but in a proactive manner (Smidt and Sursock, 2011). This is, they should not be performed only because external factors required it, but because its benefits are recognized by the various stakeholders.

It will also be assessed the phase(s) in which the Portuguese Economics and Management schools/departments, in general, are, and whether or not LLL initiatives are more proactive or reactive.

### **1.1.5 Strategy-as-Practice Approach**

The strategy as practice approach takes into consideration the practice perspective, this is, the method used by strategists to design the strategies. Therefore, in this approach there is an interest in activities of the strategic work, their actors and their skills along with the strategic tools used and the means of communication of the main strategic decisions (Whittington, 2003).

Whittington (2003) identifies the questions that permit extension of knowledge concerning strategy design in practice:

“How and where is strategizing and organizing work actually done?”;

“Who does the formal work of strategizing and organizing work and how do they get to do it?”;

“What are the skills required for strategizing and organizing work and how are they acquired?”;

“What are the common tools and techniques of strategizing and organizing and how are they used in practice?”;

“How is the work of strategizing and organizing organized itself?”;

“How are the products of strategizing and organizing communicated and consumed?”.

(Whittington, 2003).

This approach considers not only the impact of societal, cultural and organizational procedures have on the strategy practice, but also, that this practice has an influence on society (Whittington, 2006).

Whittington (2006) considers an integrated approach of strategy-as-practice where both intra-organizational and extra-organizational levels are considered.

The strategy-as-practice is a relevant approach, as it may allow the identification of the most effective strategic practices that lead to higher organizational performance. This is valuable as these practices can be transferred to other organizations, given that although mission, vision, objectives and products/services may differ among

organizations (strategy content), the way of doing strategy may be similar (de Viron, Feutrie, Filloque, 2011b).

In this thesis this approach will be followed with an attempt to determine not only the strategic content for each school, but also, the strategizing process, namely the main actors, the tools, frameworks and procedures, and the communication process.

#### **1.1.6 Strategic tools and techniques**

In the strategic management process, various strategic tools and techniques can be used to help decision-makers. In Rigby and Bilodeau's study there are defined the 25 most popular management tools, such as benchmarking, customer relationship management, customer segmentation, strategic alliances among others (see the complete list of the 25 tools in Appendix 1) (Rigby and Bilodeau, 2011).

Following it will be analyzed the role of some of the strategic tools abovementioned in the various phases of the strategy-making process in universities, and in the examination of relevant aspects of the external and internal contexts to HEIs that should be audited.

In the analysis of the external environment, which should be structured, data should be collected and interpreted (Reichel and Preble, 1989 cited in Martin, 1992).

The external environment may be analyzed resorting to an analysis of the political, economical, social, technological and environmental analysis (PESTEL analysis) (Wilson, 1974, Callan, 1986, Easterby-Smith, 1987, cited in Martin, 1992). Following data collection may be performed through discussions among people in a leadership position and external stakeholders, through consultation of secondary sources, and through scenario analysis to predict future trends.

For the internal environment analysis, the techniques and tools should be used to examine activities, structures, resources and relationships. Activities' evaluation can be mainly performed through gathering of opinion of stakeholders (Tabatoni, 1989 cited in Martin, 1992). This can be done through tools such as customer relationship management, but also through market share analysis if this evaluation is performed by the organization itself. The analysis of structures comprises an analysis of the various stakeholders and the relations among them. This can be done through the use of Porter's five forces framework, but also benchmarking.



Besides, to analyze the target of the offerings it should be used a segmentation tool, which permits to determine which segments are most appealing and the strategies to reach them. In this analysis each institution has to consider the characteristics of the product/service it offers and the characteristics of the customers of that product/service (Grant, 2010). Each HEIs should take into consideration as characteristics of its offerings, the international component, recognition abroad, the performance of the product in terms of employability, the location where the programs are offered, the duration of each program and its price, and as characteristics of the customers, age, purchasing power and geographical location. It will be analyzed if the tools previously mentioned are the ones to which Portuguese HEIs resort to when analyzing context and segmenting their offer.

#### **1.1.7 Higher Education Institutions' Organizational Culture**

Organizational culture of HEIs is closely interconnected with strategy making, and so the model of Competing Values of Quinn and McGrath (1985) will be used to examine HEIs culture and the way it is related to strategy. The axes of the model, which consist of *Flexibility, Discretion, Dynamism* vs *Stability, Control, Order* (vertical axis) and *External Orientation, Differentiation, Rivalry* vs *Internal Orientation, Integration, Unity* (horizontal axis), allow the identification of four types of organizational cultures: Clan, Adhocracy, Hierarchy and Market orientation (Quinn and McGrath 1985 cited in Ferreira and Hill, 2008).

Due to the greater autonomy conceded by the state, as well as, reduced funding available, it is expected that HEIs become more externally oriented and also more flexible (Ferreira and Hill, 2008). This is, HEIs are moving towards a more market orientation culture. So, their strategies, namely their LLL strategies will reflect this. It will be assessed if the Portuguese Economics and Business Schools are following this trend in terms of organizational culture.

#### **1.1.8 Higher Education Institutions' Governance**

HEIs' governance models are also closely interconnected with strategy design, and, so, three HEIs governance models will be put forward.

According to Dobbins, Knill and Vogtle (2011), it can be identified three models of corporate governance of HEIs: state-centered model, Humboldt Model, and market-oriented model (Dobbins, Knill and Vogtle, 2011). In the first model, state is a major influencer in the operations of the HEIs, namely in what concerns admission criteria, curricula, academic staff, and study content, having the university low autonomy. In this case, there is a *process control* (Neave and Van Vught, 1991 cited in Dobbins, Knill and Vogtle 2011). There may exist some coordination between the strategies and political objectives (Dobbins, Knill and Vogtle, 2011). The financing system is input-based, being associated to the number of students or staff (Jongbloed, 2003 cited in Dobbins, Knill and Vogtle 2011). Recently, there is a tendency for more output-based financing system in state-centered models. In the second model, academics have a great influence in the operations of the HEI, existing strong collegial control and self-regulation, specifically in what regards study content and research. However, the State has some influence in funding. There is no synchronization between the strategies and political or economic needs. In the third model, HEIs function as enterprises, which offer academic services in regional and global markets (Marginson and Considine, 2000 cited in Dobbins, Knill and Vogtle 2011). In this way, HEIs compete for attracting students and funding, which is mainly provided by external stakeholders, and the state intervention is mainly focused on fostering competition and ensuring quality and transparency (Ferlie et al., 2009 cited in Dobbins, Knill and Vogtle 2011). The State does a product control (Neave and Van Vught, 1991 cited in Dobbins, Knill and Vogtle 2011), through the provision of “quasi-governmental” accreditation agencies. Funding is output-based, as financial resources are attributed based on organizational performance. There is also a synchronization between strategies and market forces, through the cooperation between HEIs and corporations, allowing the satisfaction of external demands. It will be examined which model(s) best fit(s) Portuguese Economics and Management Schools.

### **1.1.9 Value Shop Model**

The Value Shop Model developed by Stabell and Fjeldstad (1998) will be used to analyze the schools examined in this master thesis, given that this model is more

adequate for service providers than the Porter's Value Chain, which is more suitable for manufacturing firms. This analysis is relevant as it allows the identification of the value created within an organization through the examination of the activities of strategic importance.

Stabell and Fjeldstad (1998) produced a theory, which encompasses three different models and is an extension of the Porter's Value Chain framework blended with Thompson's typology of technologies (1967), long-linked, intensive and meditative.

The value shop model is one of those three models, and according to it, value is created through the allocation of resources within an organization and the coordination of activities to solve customers' problems. It is founded on intensive technology as the intensity of resources depends on the problem to be solved (Stabell and Fjeldstad, 1998).

#### **1.1.9.1 Primary activities**

In this model, the primary activities are *problem finding and acquisition, problem solving, choice, execution and control and evaluation*. The first activity is related to the determination problem of the customer to be solved. Following there are the activities that permit the generation of solutions to the problem assessed and then the choice of which of the solutions to perform. The execution involves the activities that are related to the communication and implementation of the solution(s) chosen, and then there are the activities that allow the evaluation of the solutions in actually solving the problem. The activities previously described are not linear, they are cyclical and iterative, given that the evaluation of the solution(s), may lead to the discovery of a new problem by discovering a new unmet need and so it might lead to the initiation of a new cycle of activities (Stabell and Fjeldstad, 1998).

Educational providers, such as HEIs, fit in this model. They have to perform activities to determine which competences students need to develop (*problem finding and acquisition*), then to assess the best way to provide those competences, determining various possible programs to offer (*problem solving*), and then chose among those the ones that best answer the needs (*choice*), implement them and assess their performance in providing students the skills (*execution and control and evaluation*). In this last activity HEIs in determining whether the activities are providing students

with the competences expected and required by the labor market, may find a new competency that should be further developed, and so a new problem is posed, leading HEIs to start searching for, implementing and evaluating a new program (cyclicity of the activities) (Stabell and Fjeldstad, 1998).

#### **1.1.9.2 Support Activities**

The support activities in this model are performed simultaneously to the primary activities (Stabell and Fjeldstad, 1998).

In the case of educational providers, human resource management, which consists of attracting, retaining and investing in the development of Professors, depends on the problem the students pose and on the solution achieved to solve it, and so, on primary activities. This is because the Professors to be attracted and retained should be recognized in the problem's domain. Besides, this close link is also patent in the fact that the attraction of students is dependent on the reputation of professors in the field of their problem.

A highly relevant value driver is success given that through the recruitment of the best human resources, this is, nationally and internationally recognized professors, the institution has access to the best customers, top performing students, creating a virtuous cycle, given that with the best professors and students, the institution can perform better, have publications in well-known journals, be searched by top students and be recognized by external organizations, and in this way attract the best professionals.

Therefore, in this model value is signaled to external stakeholders through highly recognized professors, demand that exceeds supply, admission that is difficult and exclusive, publications in well-known journals and accreditations. In this way, it is possible to infer that the schools examined should transmit value to the stakeholders through these procedures, and this has to be further analyzed.

Furthermore, it should be emphasized that in this model there are not notable scale advantages but there are location advantages. This is, the majority of the value shops are relatively small, which facilitates the coordination of activities, such as problem finding and problem solving, and take advantage of being located in places attractive to high-quality professionals (Stabell and Fjeldstad, 1998).

The existence or not of location advantages will be analyzed for the schools in the study.

#### **1.1.10 Ansoff Matrix**

The Ansoff Matrix (Ansoff, 1965 cited in Hussey, 1999) puts forward the four strategies through which an organization may increase its revenues, and it will be applied to HEIs. These strategies are: market penetration, market development, product development and diversification.

The first strategy, market penetration, consists in offering more of the same product/service to the same group of customers. It is quite difficult to be applied to HEIs as each individual is only willing to have a given educational offering once.

The second strategy, market development, consists in offering the same product/service to a different group of customers. HEIs may offer the products already offered to traditional students to mature students. This is more difficult for undergraduate programs due to legal limits that condition the access of students to those programs. However, this is possible for masters, PhDs, post-graduations, and other levels. If the new target consists of mature students, it may imply some changes in the communication of the programs to be able to inform those students of their existence. This has, nevertheless a difficulty, which is, as the programs are exactly the same as the ones offered to traditional students, they might not be the most suitable for experienced learners.

The third strategy, product development, consists in offering a different product to the same group of customers. In HEIs it occurs with the offering of various programs, which may conduct to a diploma or not, to the same group throughout life. These new programs may also be offered to a different group of customers and it consists of the fourth strategy, diversification (offering different products/services to a different target group). This strategy is highly connected with the offering of Lifelong Learning opportunities, given that it incorporates the programs changed in terms of forms of delivery, schedule or content to be offered to a new group of customers, which may be experienced people. An example of this last strategy is the creation of part-time programs, which are adaptations of existing programs to attract working students.

## **1.2 Universities - Current Trends and Challenges**

This second part of the literature review will be devoted to the development of the current state of play of European Higher education market.

European higher education is becoming increasingly integrated due to increasing social, economical, political and cultural integration. This integration of the higher education systems is also occurring at the world levels (but to a lesser extent) due to the globalization phenomenon, the diminishing in transportation costs and greater speed of information flows (Teixeira, 2013). This growing interconnectedness allows the identification of common trends, challenges and strategic directions of universities at the European level. The trends and challenges identified are relevant as they influence HEIs' strategies, given that, as referred above, strategy elaboration should take into account internal and external factors to the organization.

### **1.2.1 Massification, Funding and Diversification of income streams**

There has been a massification of higher education, with an augmentation in the number of students, accompanied by the appearance of challenges such as how to finance this increasing number of students (Teixeira, 2013).

Funding is an area that has been facing changes, with a decrease in public financial resources, a tendency towards diversification of income sources (Estermann and Pruvot, 2011), and a trend towards the attribution of funding according to targeted performance goals (European Commission, 2011).

Nevertheless, it is relevant to highlight that LLL activities contribute only on a very small percentage to this diversification, existing a great emphasis on the charge of tuition fees, especially at the master level and above (Smidt and Sursock, 2011).

As the national budget is still of greater relevance in terms of funding, in countries where there is a need to cut in public expenditures, HEIs are suffering severe cuts, which may compromise the offering of a great diversity of programs. However, there are some financial resources coming from European institutions. Some examples are the ones from the European Regional Development Fund, which aim at enhancing digital equipment in the institutions and to assist in partnerships with businesses and in spin-offs, and the ones from the European Social Fund, which aim to contribute to the modernization of HEIs and to improve the content provision (European Commission, 2011).

### **1.2.2 Competition**

It has also been verified a growing competition among European HEIs, not only, to attract students, but also professors, and financial resources (Alves, Mainardes e Raposo, 2010).

### **1.2.3 Market and Stakeholder orientation – Relationship-based HEIs**

Due to increased competition for students and funding, HEIs have started to behave more like enterprises, becoming more market oriented and concerned with the various stakeholders. Hence, HEIs have begun to perceive students, strategic partners and enterprises as consumers of the services they have to offer, and so, they are changing from knowledge-based to relationship-based organizations (Pausits, 2007).

### **1.2.4 New Managerial Practices and Differentiation**

Indeed, this market and stakeholder-orientation, has conducted to the application of new managerial practices in HEIs (Pausits, 2007), with a greater emphasis on assessment and monitoring of the quality of the services provided, and, so a tendency towards vertical differentiation (Beerkens-Soo and Vossensteyn, 2009) with rankings and quality assessments gaining increasing relevance. Indeed, there has been an increasing competition for reputation (van Vught cited in Teixeira et al., 2011).

### **1.2.5 Quality Assessments, Rankings and Accreditations**

Therefore, quality assessment procedures and accreditation methods' importance has proliferated. Accreditations, such as EQUIS and AACSB, and good results in quality assessments and in international rankings, such as for example the ones of Financial Times and Eduniversal, are more and more perceived as essential to certify the quality of the universities' programs, nationally and internationally, and so, guarantee potential students that they are making a good choice. Thus, these reputation elements are increasingly valued, by learners, when choosing a university (Smidt and Sursock, 2010).

### **1.2.6 Internationalization**

As resources available in terms of funding are scarce, HEIs have started to search for new publics to offer their services (Teixeira et al., 2011). International students are an interesting target group to attract. Therefore, HEIs have been adopting an international approach to teaching and research, through the development of joint programs, alliances, partnerships and European networks. However, there is no European approach in what concerns internationalization to countries outside Europe, adopting each country a different strategy (Smidt and Sursock, 2010).

### **1.2.7 Partnerships**

The stakeholder oriented approach that HEIs are following is increasingly connected with the next trend: the establishment of partnerships with various stakeholders. HEIs have a great diversity of partnerships with various stakeholders (Smidt and Sursock, 2010).

One of those partnerships, the one with enterprises, is spreading across Europe. However, it is still more spread in some countries than in others. Besides, even within one country some HEIs may establish more partnerships than others (Commission of the European Communities, 2009). These partnerships are advantageous for both parties, the HEI and the enterprise, as well as, for the economy as a whole.

An advantage comes from the better match between the qualifications of the people formed at the HEI and the ones searched for by the labor market. This is because the increased communication allows HEIs a deeper understanding of the skills enterprises are searching for in students, and prepare them accordingly. This may permit an increase in employment rates, bringing benefits to the economy. Other advantage consists of an encouragement of entrepreneurial behavior in students through programs offered in collaboration with companies, as well as, through contact with the experiences of people from enterprises, that foster creativity and willingness to be entrepreneur (Commission of the European Communities, 2009).

Another advantage is at the research level, with HEIs serving as research centers that generate innovations, which can be channeled to the market by partner companies, and with the performance of research activities from employees of partner companies,



as a result of the trend of increasing PhD researchers working for an enterprise at the same time (Commission of the European Communities, 2009).

### **1.2.8 Technology Adoption**

The target of new niches and new publics also implies that HEIs should innovate in terms of teaching methods used. The use of communication technologies in HEIs has been spreading, but there are still improvements to be made. Some HEIs are taking more advantage of the use of ICT than others, whose pace of adoption is still very slow (Commission of the European Communities, 2008).

ICT is being used in HEIs mainly to divulgate courses content, perform assessments, strength the contact between teachers and students. E-learning courses are still not common (Commission of the European Communities, 2008). The approach mostly used has been blended learning (b-learning), also called hybrid or mixed learning. This consists of the use of e-learning to complement traditional/ face-to-face learning. This allows the socialization that is not possible in e-learning, but also an extension of the interaction between students and between them and the professors beyond the class (Tayebinik and Puteh, 2012).

However, even though distance education may not allow for socialization, and so causing more drop-outs (Tinto, 1975 cited in Tayebinik and Puteh, 2012), it allows the enlargement of the group of learners reached, through an increase in the geographical scope covered, and so may facilitate the provision of LLL opportunities, but also the internationalization process of an HEI (Commission of the European Communities, 2008). Nevertheless, it is important to refer that only a small percentage of people use the Internet to perform online courses (Eurostat study cited in Redecker, Ala-Mutka, Punie, 2010).

HEIs should also use ICT for communication purposes as a good percentage of people in European Union (EU27) resorts to the Internet to research for learning opportunities (Redecker, Ala-Mutka, Punie, 2010).

### **1.2.9 Lifelong Learning Activities**

The search of HEIs for new publics and niche markets is closely related to the development of LLL activities that is occurring to diversify services provided, and so

income sources (Davies, Németh and Pausits, 2010). However, this strategy concerning the offering of LLL activities is not usually incorporated in the mission and vision of the HEIs, and so not integrated with the traditional activities performed (Smidt and Sursock, 2011).

#### **1.2.10 Types of Learners**

The offering of LLL initiatives and the changes at the societal, economical and technological level have produced alterations in the student populations. The pool of students is no longer only composed by on-site young learners, but also by older students, part-time students, distance-learning students that attend just some specific classes, and returning learners, and so learners with different interests and needs that have to be conciliated and satisfied by the HEI through the adoption of a learner-centered approach (Smidt and Sursock, 2011).

### **1.3 Lifelong Learning**

This third part of the literature review will be conducted to increase the understanding concerning the current state of play of the LLL field.

#### **1.3.1 Diversity of definitions**

The concept of lifelong learning is considered abstract as its definition varies significantly from one institution to another. The concept was created four decades ago (EAEA, 2006), but the attention surrounding its importance and practice has increased, recently, due to societal, economical, organizational and demographical changes (OECD, 2004).

The definitions of the concept vary with cultural and institutional factors (Smidt and Sursock, 2011).

One of the definitions is the one adopted by the European Commission, that defined LLL as any learning initiative whatever its purpose at any time in life (EU, 2001 cited in Smidt and Sursock, 2011).

Another definition is the one of OECD that affirmed that lifelong learning consists of all learning activities pursued throughout life, being more encompassing than just adult or recurrent education and comprising four specific attributes.

The first is its systemic view, given that it includes all types of learning, formal, informal and non-formal. The second one is the centrality of the learner, as LLL has to be constructed around learners needs. The third one is the requirement of the existence of motivation to learn, as it demands that the learner is willing to learn and able to define his own learning path. The fourth is its multitude goals to different learners, and so the diversity objectives of education policy (OECD, 2004).

Besides, the term lifelong learning has also other terminologies such as lifelong education, proposed in the Fauré Report (Fauré Report cited in Medel-Añonuevo et al., 2001), adult education, and continuous education among others.

Lately, there has been a change of the focus from education to learning. This new focus on learning may be justified by the fact that the provision of learning opportunities should be centered on the learner and on the acquisition of new competencies that should be pervasive and occur in numerous situations in life, instead of a focus on the teaching activities which are perceived as activities less spread throughout life (Sursock et al, 2011 cited in Smidt and Sursock, 2011).

This thesis will be centered on the provision of LLL opportunities by HEIs. Therefore, following it will be discussed the concepts of university lifelong learning (ULLL) and lifelong learning university (LLLU).

### **1.3.2 ULLL and LLLU**

The meaning of ULLL varies across institutions, and may be settled based on the target groups of the institution (mature students, adults, working students), mode of delivery (part-time, e-learning/distance learning), entry requirements, course characteristics (short courses, post graduate courses), and fee structure, among others.

But each of the several definitions leaves something out, so the concept of LLLU may be more adequate to define an institution where LLL is at the center of all activities, to assure that the willingness to learn is fostered from the beginning and that HEIs provide opportunities to learn for any target group throughout life (Davies, Németh, and Pausits, 2010).

### **1.3.3 Importance of LLL in the contemporary society**

LLL is increasingly important in today's society, as people have to have the opportunities to constantly update their knowledge and competencies to be able to ensure employability, career improvements and participate in societal and cultural activities. This is due to the intensification of the globalization phenomenon, the continuous technological changes and changes in the labor market, which is becoming more volatile, with people changing jobs much more recurrently (OECD, 2004).

In the European societies with the economic and financial crisis, and the ageing of the population, LLL is progressively gaining relevance, not only for the people who are trying to maintain or get an employment, but also for the HEIs, which aim to enlarge their target groups due to the shrinking of the traditional ones (Smidt and Sursock, 2011).

### **1.3.4 Future challenges for HEIs to engage in LLL**

In order for the European HEIs to embed LLL in institutional strategies and ensure wide access to it, several aspects have to be improved.

The first aspect, which may require some improvements, is the pedagogical approach. It has to be learner-centered, and, so, the teaching approach has to incentivize students' autonomy, pro-activity and interactivity in courses, focusing on group works and seminars, and the support services have to be able respond to the demands of the diverse students. This may be limited by financial, regulatory and cultural aspects, lack of funding or of autonomy to allocate the resources, as well as, by the unwillingness of the parts involved to change behaviors (Smidt and Sursock, 2011).

The second aspect that requires improvements is the accessibility to learning opportunities. Individuals with higher qualifications and employees from large companies have more access to LLL initiatives than people with lower qualifications or employees from small enterprises (OECD, 2004). This accessibility is also hindered due to the "digital divide" problem. This is, people with lower knowledge of ICT may not have equal access to the opportunities available because the ICT may be a mean to reach LLL initiatives (Commission of the European Communities, 2008).

The third aspect that demands improvement is the connection between the different learning settings. Stronger links between learning settings would encourage individuals to progress from one type of education to another (vocational and tertiary education, non-university and university education, for example), assuring the access of a broadest group of people to LLL. For this to be improved, the system for recognition of prior learning, and the cooperation between the different stakeholders involved in the various learning settings has also to be enhanced (OECD, 2004).

The fourth aspect to be improved is the funding system. This is because LLL initiatives imply an increase in costs given the need to expand the capacity to provide not only learning activities but also support services to more students. However, because of the crisis, public and private funding, as well as, grants to students have been reduced (OECD, 2004).

The fifth aspect to be improved is the participation rates in LLL. Even though the rates vary from country to country, in Europe, they are in general low. To change this, authorities should assess the motives of the low participation rates and ways to overcome this. One way might be the improvement of the information available on opportunities, as there is evidence that individuals are not aware of them (Bengoetxea et al., 2011).

The last aspect to be improved is the communication the institutions make on the potential benefits of engaging in further learning. This is because, even though individuals consider valuable an upgrade of competencies, they are doubtful about whether it will have a positive impact in their career prospects or not, and, so, if they will get a return on their investment in terms of time and financial resources. Individuals are also concerned that it seems a retrocession or if they will be capable to devote the time required. The high levels of unemployment, in Europe, also make it more difficult for individuals to perceive the potential benefits of undertaking LLL activities given that people may believe there is no purpose in spending time and resources updating competencies if there are no jobs available, even though it may be an opportunity to upgrade skills and so be able to reenter the market (study from Thron et al, 2010 cited in Bengoetxea et al., 2011).

### **1.3.5 Quality Assessment in LLL**

One important aspect to salient in LLL is the relevance of the quality assessment procedures, as quality assurance frameworks allow that initiatives are recognized nationally and internationally, facilitate the linkage between different learning settings (Bengoetxea et al., 2011), and ensure the recognition of the legitimacy of the programs (Smidt and Surssock, 2011).

Some European tools that allow the quality assurance are the European Key Competences Framework for Lifelong Learning, the European Qualifications Framework, the European Credit system for Vocational Education and Training and the European Guidelines for validation informal and non-formal learning, among others (Bengoetxea et al., 2011).

Nevertheless, it should be emphasized that to provide LLL initiatives at the European level it is necessary the cooperation between national and European authorities, and a deep understanding of the various quality assurance systems, as well as, a strong interconnection between them, given that the national tools are of the most importance, as, currently, the quality assurance systems are very different from country to country and within a country between fields of study and within them (Bengoetxea et al., 2011).

One additional aspect concerning quality assurance of LLL practices is that their quality should be evaluated taking into consideration parameters different from the ones considered in the traditional learning path (Bengoetxea, et al., 2011).

### **1.3.6 Valuing Prior Learning in LLL**

Valuation of prior learning, which consists of the recognition of all learning competences acquired by an individual whatever the learning setting (Duvekot, Schuur and Paulusse, 2005), has various advantages for LLL.

The first one is that it may incentivize individuals to engage in further learning, given that it avoids the discouraging experience of having to learn in class something one already knew how to perform in practice because that task was part of one's job (OECD, 2007b).

The second advantage concerns the reduction of costs to engage in learning initiatives. This is due to the fact that by recognizing as a learned competence a task that one already knows, the costs of teaching it again cease to exist (OECD, 2004).

The third advantage is that it may allow a stronger linkage between different learning settings, as the recognition of the activities performed in one setting may facilitate further engagement in other types of learning settings (Duvekot, Schuur and Paulusse, 2005). Also, VPL contributes to LLL implementation through the acknowledgement that learning does not occur only in formal settings but also in other learning environments and by linking the two (Duvekot, Schuur and Paulusse, 2005).

Another advantage is that it contributes to personal fulfillment, and to the entry or re-entry in the labor market, since it permits the communication to the employers of the competences acquired in all environments through their recognition, contributing to a raise in the employment rates in society (Duvekot, Schuur and Paulusse, 2005).

In this way VPL has a summative purpose, through the acknowledgement and valuation of acquired competences and provision of certification, and a formative purpose, as it permits further development of competences by creating a personalized learning path through the recognition of previous informal and non-formal learning (Duvekot, Schuur and Paulusse, 2005).

Nonetheless, it is relevant to emphasize that country differences in terms of VPL are possible to be identified due to different national learning cultures which comprise relations between different learning providers, authorities, socio-economic factors, regulations and structure of labor market, amidst others (Duvekot, Schuur and Paulusse, 2005).

The various European learning cultures can be aggregated in seven groups: Anglo-Saxon, Dual System, Eastern Europe, Mediterranean, Mix Model and Northern Europe (Duvekot, Schuur and Paulusse, 2005 adapted from Making Learning Visible by Jens Bjornavold, 2000). Different cultures focus differently in academic and vocational education, perceive differently the lifelong learning concept and have different educational policies, and, so, have a different approach concerning VPL (Duvekot, Schuur and Paulusse, 2005).

It was analyzed whether HEIs in this study are conceding prior learning valuation practices and to which extent.

#### **1.4 Lifelong Learning at the European level**

This fourth part of the literature review will be dedicated to deepen the understanding concerning European institutions' policies and goals relatively to HEIs, namely concerning their LLL provision.

##### **1.4.1 European Main Goals**

Considering that the acquisition of competences is of the utmost importance for European citizens to overcome the challenges posed in the current fast-paced changing world, the European Commission has defined several goals regarding the modernization of HEIs, their provision of knowledge, and also LLL provision and accomplishments.

One goal consists in the accomplishment by 2020 of a knowledge and inclusive society, with the enlargement in the number of employment opportunities provided - Europe 2020 objectives (European Commission, 2010). For this it is relevant that another goal is reached: an increase in the number of graduates and researchers, enlarging the number of people that reach higher education.

So, another Europe 2020 target is the one of having 40% of people between 30-34 with higher education or equivalent. To accomplish this the commission aims to develop clear paths from vocational education into higher education and to provide more information to learners concerning LLL opportunities (European Commission, 2011).

Besides, another goal concerns the formation of more researchers to transform European economies into research intensive ones. For this to be accomplished, the commission wants to help in the creation of national strategies that foster training and retraining of researchers (European Commission, 2011).

Another goal is that there is a stronger link between HEIs and employers and greater practical component in courses, to assure that individuals formed have the competences required by labor market. To ensure this, there is also the aim to encourage the gathering of data concerning employment, as a basis to elaborate and improve course content and evaluation (European Commission, 2011). So, it is



believed that a strong interconnection between research, education and business allows economic growth and development, employment and an improvement in the position of European higher education institutions internationally (European Commission, 2011).

Further goals are the provision of learning in various modes, such as part-time, distance learning, e-learning, and an improvement in the use of ICTs in the offering of learning initiatives in order to enlarge the group of individuals that participate in learning activities (Commission of the European Communities, 2008).

Another objective is that HEIs' staff also has the opportunity to engage in further learning, and that incentives are provided for that (European Commission, 2011).

Another objective is to internationalize European higher education system and promote Europe as a good place to study. It also wants to foster the mobility of students, teachers and researchers among HEIs, through credit recognition and through the implementation of directives on students and researchers and of a EU Visa Code (European Commission, 2011).

The commission aims to provide incentives for this to happen and for national authorities to foster this. Besides, the commission also considers that member states should provide HEIs with the freedom to take their own strategic decisions such as, definition of admission procedures, content of the courses, income allocation, among other aspects (European Commission, 2011).

#### **1.4.2 European Union Policies**

It is the Commission belief that member states are the ones responsible for the design of policies, which allow the accomplishment of all the goals previously mentioned. Nevertheless, it also commits to design and implement policies, as well as, to monitor and continue the ones already implemented in order to create incentives and conditions for the attainment of those goals (European Commission, 2011).

One measure consists of the gathering of data concerning higher education employment outcomes and mobility together with Eurostat. Another one consists in the ranking of HEIs according to their performance - U-Multirank. The third one consists in the creation of a "mobility scorecard" and of programs that facilitate the mobility of students, teachers and researchers - some that are already in place are the

Erasmus program and the European Framework for Research Careers, the ECTS system (European Commission, 2011).

### **1.4.3 EUA Charter for Lifelong Learning**

The European Universities Association defined various main goals, in the form of commitments, for universities to perform well in Lifelong Learning. As main objectives, universities should include the lifelong learning concept in their strategies, widening the target students and adapt the programs offered to accomplish this, enlarge the number of additional student services provided to new types of learners, value prior learning and include LLL in quality assessments. Besides, universities should reinforce the links between research, innovation and teaching from a lifelong learning point of view, as research and innovation can be fostered through LLL initiatives and LLL practices can be improved through research. Moreover, they should engage in partnerships with enterprises, other higher education institutions and other stakeholders in order to provide LLL opportunities tailored to the labor market, and that satisfy the diverse needs of the enlarged group of learners. Further, higher education institutions should implement the various reform processes on progress to modernize the higher education, which will help in the creation of a LLL environment by creating a focus on the learner. Finally, universities should provide LLL initiatives for their teachers, researchers and staff (EUA, 2008).

### **1.5 Main objectives**

The strategic approaches previously mentioned allow the theoretical framing for the analysis of the similarities and differences in the LLL strategy content and process of Portuguese economics and business schools/departments and the provision of recommendations for future improvements, which are the main goals of this master thesis.

In strategy content it were studied:

- Its mission, vision, motivation and values regarding LLL;

- Main objectives to be reached concerning LLL, to the medium and long-term and main challenges;

- Organization of LLL strategies implementation

In the strategy process it were studied:

- The internal and external factors influencing the elaboration of LLL strategy;
- The actors with the responsibility of designing and implementing LLL strategy;
- The communication plan of the LLL strategy;
- The LLL strategizing process characteristics and development steps
- The strategic tools and techniques used for LLL strategizing

### **1.6 EUCEN – ALLUME Project**

Given that the methodology used by EUCEN in the ALLUME Project was the basis for the one used in this thesis, the ALLUME (A Lifelong Learning University Model for Europe) Project will be further explained. One of the main goals of the ALLUME Project, produced in collaboration between EUCEN and European partner universities, was to widen the participation of those universities in LLL. Besides, it aimed to create A Lifelong Learning University Model for Europe, but it became evident throughout the project that this would not be possible due to the diversity of institutions and strategies at stake. Therefore, instead, Pathways for LLL Universities were drawn (de Viron, Feutrie and Filloque, 2011a).

The ALLUME Project included the elaboration of case-studies concerning the institutions involved in it, the examination of the results of those case-studies, the elaboration of draft (flexible) tools which help universities to design and implement a LLL University strategy, together with visits to those institutions that did not considered LLL a priority and a discussion of the tools and results reached. Besides, tools and results were discussed in the end. The tools designed are: Tool for Self-Analysis (Process), Tool for Self-Analysis (Content), and Tool for Benchmarking against the European Universities' Charter on LLL. The first tool's objective is to allow the assessment of the way of doing strategies, main actors and drivers. The second tool's goal is to get an overview of current LLL strategy, main objectives and mission and vision. The third tool's objective is to provide recommendations for improvement through the benchmark against commitments drawn by European Universities Association (EUA) (de Viron, Feutrie and Filloque, 2011b).

The ALLUME Project tool for analysis of strategy process was based on questions developed from questions proposed by Whittington in his work of strategy-as-practice

(and which were previously detailed in the sub-chapter dedicated to this strategic framework). The questions of the ALLUME Project were:

1. “Why does the process of strategizing begin? What are the internal/external drivers of change?”
2. “Who does the formal work of strategizing? Who are the internal actors? What are their roles? Are they do-ers, influential persons, researchers, decision makers? Who are the external actors? What are their roles? Are they do-ers, influential persons, researchers, decision makers?”
3. “How is the process of strategizing done?”
  - a. “What is the process characterization? Formal or informal?”
  - b. “What level of development? Described in four steps: analysis, design, implementation and evaluation.”
4. “What are the tools and techniques used for strategizing?”
5. “How are the products/results of strategizing communicated?”

(de Viron, Feutrie and Filloque, 2011b)

These questions allowed each university to analyze its own process of LLL strategizing. These questions were further developed into sub-questions, and they can be applied to any university, which can then compare itself against the results of the already analyzed universities. In the ALLUME Project the analysis in terms of content was mainly performed through an assessment and interpretation of each university’s mission, vision, motivations and priorities for the medium-term, as well as, SWOT analysis. In the Project there was also a tool for benchmarking against the EUA commitments on the charter on LLL. This tool helped each university to position itself in a scale of one to ten relatively to each one of the commitments, and then determine path for improvement. In this way, there is an incitation to stakeholders’ reflection concerning LLL and raise in awareness concerning it. The information presented in the case studies (self-assessment reports made to universities) was compiled in two transversal analyses (de Viron, Feutrie and Filloque, 2011b).

## **Chapter 2: Methodology**

### **2.1 Theoretical Framework**

To assess aspects of the Lifelong Learning strategy content and process of the schools/departments, it was adapted an approach used in the ALLUME Project of EUCEN.

### **2.2 Research Design**

Besides, the collection of primary data, secondary data was also assembled for each school/department of the sample. This secondary data will be presented in the next chapter, to contextualize the study.

Concerning the research methods chosen to collect primary data, it was used more than one data collection technique, this is, multiple methods were used to gather information to answer to the research objectives. The approach chosen was the exploratory qualitative analysis of the qualitative data, collected through interviews, and the quantitative analysis of the quantitative data, gathered through a survey. This use of multiple methods allows a better answer of the research objectives, namely it allows combining the findings concerning the LLL strategy, from each school's perspective, with the ones from the potential students perspectives, and so provide more in-depth recommendations. The study is a cross-sectional study, this is, the study focus on analyzing commonalities and differences in LLL strategies, at this moment, and does not attempt to analyze changes across a long period of time (Saunders, Lewis and Thornhill, 2009).

#### **2.2.1 Case Study Methodology**

Similarly to what was done in the ALLUME Project of EUCEN the case study methodology will be used in this master thesis.

A case study can be defined as “(...) an inquiry that investigates a contemporary phenomenon in a real-life context, when the boundaries between phenomenon and context are not clearly evident, and in which multiple empirical sources are used” (Yin, 1989 cited in de Viron, Feutrie and Filloque, 2011b).

In this case the context are Portuguese Economics and Business Schools and the phenomenon is the development of a LLL strategy.

To perform these case studies, first, an interview script was designed based on questions posed by EUCEN in the ALLUME Project, to be posed to the various interviewees. Then categories and sub-categories were defined to analyze the interviews and the results were presented in the form of two transversal analyses. These steps of data collection, sample selection and structure of analysis of the interviews will be further described following. Besides, these steps for the survey will also be put forward.

## **2.2.2 Data Collection**

### **2.2.2.1 Semi-structured Interviews**

In ALLUME Project LLL strategy content and process were self-assessed. On the contrary, in this thesis the information was gathered through qualitative semi-structured interviews performed during the month of July, to faculty members with a notable responsibility in the decision-making (interview script is presented in Portuguese and English respectively in Appendix 2 and 3).

The choice of the interviews as the method to collect data has various reasons. One reason is that this type of interviews allows for interviewees to build on their answers, permitting a richer collection of data (Saunders, Lewis and Thornhill, 2009). A second reason is that this method allows face-to-face contact, increasing the willingness of people to participate in the study relatively to the fill of a questionnaire (Saunders, Lewis and Thornhill, 2009). The third reason is related to the amount of data to be collected. To accomplish all the objectives defined, a large amount of data had to be collected, and so the questions designed to gather it were open-ended, leading to a situation where interviews were considered the most adequate way to collect the information (Easterby-Smith et al. 2008 and Jankowicz, 2005, cited in Saunders, Lewis and Thornhill, 2009).

### **2.2.2.2 Survey**

Besides, the semi-structured interviews, self-administered questionnaires were posed to potential students, through the Internet – internet-mediated questionnaires. They

were used to collect data concerning the attitudes of potential students to the offerings of schools.

The use of self-administered questionnaires has some advantages namely the one of avoiding the giving of an uninformed response, and/ or of a response that is thought to be more socially pleasing. This method was considered adequate, as the questions were not too complex; were closed questions where the respondent only had to mark its choice – multiple-choice questions. The majority of the questions were list questions, but there was also a rating question, where individuals were asked their level of agreement or disagreement regarding a given set of statements (Saunders, Lewis and Thornhill, 2009).

The survey script was designed in order to gather information concerning the willingness or not to engage in further learning and the reasons for that, the perceptions over current offers, and preferences concerning teaching approaches. This was performed in order to be able to enrich the recommendations provided to the schools for LLL strategy making. There was the need to translate the questionnaire to be included in this thesis, as it was performed in Portuguese and has to be included in English in this thesis. Portuguese version is in Appendix 4 Portuguese and the English version in Appendix 5.

The questionnaire was subject to a pilot testing to assess its validity, this is, to assess whether it made sense to the people who were its target. As a consequence, some changes were performed, namely the adding of filters to skip questions for some answers. The software used to perform the questionnaire was Qualtrics software.

### **2.2.3 Sample**

#### **2.2.3.1 Semi-structured Interviews**

The unit of analysis was an economics and business school or a department depending on the size or organization of the university. For smaller and more centralized universities, there are economics and management departments. For bigger and more decentralized universities, there are economics and management schools.

The field of business and economics was chosen due to its attractiveness to develop a LLL strategy, having EUCEN considered that schools in the field of economics and management have the adequate conditions for universities to launch pilot projects of

LLL strategy, as these schools have a close interaction with the professional world and society (de Viron, Feutrie and Filloque, 2011b).

Business and economics schools are considered to be relevant providers of continuing education opportunities relatively to the industry (Brandt, 2002).

Various economics and business schools in Portugal were contacted to be interviewed for the master thesis. The sample used in this study consists of 6 Portuguese economics and business schools/departments. These schools or departments of economics and management are: Nova School of Business and Economics from Universidade Nova de Lisboa, School of Economics from Universidade do Algarve, ISEG from Universidade de Lisboa, Departments of Economics and Management from Universidade de Évora, School of Economics from Universidade do Porto and School of Economics from Universidade de Coimbra.

### **2.2.3.2 Survey**

The sample for the survey was random people who satisfied one criterion. The people answering the survey had to be Portuguese, because it is more probable that those people engage in further learning opportunities in Portugal throughout their lives than foreigners, who will probably invest in that in their own country. So, one important aspect to salient in the survey is the diversified sample of people who answered it. The only characteristic of the sample filtered was if the people answering the survey were Portuguese or not. This was done by introducing a first question where the people who answered they were not Portuguese were taken to the end of the questionnaire and were thanked for their collaboration. All other characteristics of the people who answered the survey were not controlled, and, as it was posted on a social network, it reached people from the most diverse age groups and backgrounds, reducing in this way the bias that could have been introduced if the majority of people was from a given age group, field or level of education.

### **2.2.3 Structure of Results presentation and Analysis**

The results from the interviews are presented through the analysis of the data in two transversal analyses, one concerning the strategy content and other concerning the strategy process.



The categories of those analyses were defined based on the categories of the transversal analyses of the ALLUME Project with some adaptations (de Viron, Feutrie and Filloque, 2011b).

The categories developed are considered the most adequate given that they allow for a structure, in which, the organization of data is closely linked to the research goals and theoretical propositions (Saunders, Lewis and Thornhill, 2009). The categories for the transversal analysis of the strategy process are: internal and external drivers influencing LLL strategies, the main actors of LLL strategizing, the LLL strategizing process characteristics and development steps, the strategic tools and methods used for LLL strategizing, the LLL strategizing product communication.

The categories for the transversal analysis for the strategy content are: vision, mission, motivation and values, challenges and objectives, and organization of LLL strategies implementation.

In this master thesis there was a search for meaning of the data of the interviews, which was performed by allocating the data to each of the categories defined for the transversal analyses, and in the case of strategy process the data was allocated to sub-categories.

Following it will be presented the sub-categories for each category of the transversal analysis of the strategy process, which were defined based on the transversal analysis of strategy process of ALLUME Project (de Viron and Hesse cited in de Viron, Feutrie and Filloque, 2011b).

For the Drivers the sub-categories are:

External Drivers: Legislation - Politics; Public Finance; European policies (social funds, politics); Economical situation; Duty to society; Markets; Structural Problem of funding; Demography

Internal Drivers: Investment - Budget; Desire to improve access; Previous experience in LLL; Necessity-Demand; School's structure; Internal cooperation, change in the organization (internally); LLL culture

For the Main Actors the sub-categories are:

Internal Actors

Do-ers: professors, responsible person for LLL structure, specific units

Researchers: In LLL education, In other topics

Influential People: dean, vice-dean, head of specific unit, administrative

Decision-makers: direction, teaching council, head of specific unit, administrative

External actors

Do-ers: private enterprises, public administration, specific ministry, government, stakeholders

Researchers: Of other national universities/schools, of international universities/schools, of high schools

Influential People: private enterprises, public administration, specific ministry, government, stakeholders

Decision-makers: Government, specific ministry

For the Strategizing Process characterization the sub-categories are:

Informal: Interaction with society; Coordination - Cooperation; School's Culture; Funding Bodies; Response to individual objectives of students; Increase Accessibility; Mobilization – Motivation, recognition

Formal: School's strategy; Creating working groups; Implementation Plan; Allocation contract; Academic staff involvement; Specific Council; Mainstreaming - Holistic; Collaboration - Partnerships; Research base

For the development steps the sub-categories are:

Analysis: specialization studies, focus on research market

Design: learning environment, exploitation of networks, monitoring, inputting of human resources

Implementation: Pedagogic training, setting priorities, special units for LLL, new services, pedagogic innovation, e-learning, product range, internationalization, adapting supply – variety of services – flexible training offer, recognition of prior (informal, non formal) learning

Evaluation: institutional, external structure

For the Strategic Tools:

Strategic Plan; SWOT Analysis; Cost Management; Quality Procedure; Observations (statistical data collection); Special Services to learners; Independent structure for LLL; Mentoring system; IT support system; External funding; Recognition of Prior Learning

For the Strategic Techniques:

Multi-field approach, reinforce networking; support services for the actors, triangle approach in practice; create image for LLL, comparison (benchmarking), structured course offering

For the Strategizing Product Communication:

How: Events, Conferences; Broader Discussion; Embedded communication plan; Round tables for development of continuing education

Where: Website; Press; Alumni organization; Internal Newsletter; Scientific Publications

In the ALLUME Project transversal analyses were made based on matrices that classified the degree of influence of each of the meaning units referred by each school (de Viron, Feutrie and Filloque, 2011b).

In this master thesis the transversal analyses were constructed considering the reference or not to an aspect of each category or sub-category.

A table of synthesis of both studies main aspects is presented below:

	<b>ALLUME Project</b> (de Viron, Feutrie and Filloque, 2011b)	<b>This Master Thesis - own Study</b>
<b>Strategic Framework</b>	Strategy-as-practice	Strategy-as-practice
<b>Research Design</b>	Content analysis using meaning units until saturation Then quantitative methods used to assess the intensity or occurrence of the items	Exploratory Qualitative Analysis
<b>Sample</b>	10 Universities	6 Economics and Business Schools
<b>Data Collection</b>	Self-assessed questionnaire	Semi-structured interviews
<b>Presentation of results</b>	10 Case Studies; Compilation of 2 transversal analyses	Compilation of 2 transversal analyses

Table1: Differences and similarities in the main aspects of the ALLUME Project (de Viron, Feutrie and Filloque, 2011b) and own study

### **Chapter 3: In-depth analysis of the context and Case studies presentation**

#### **3.1 Contextualization**

The collection of secondary data allowed the characterization of the Portuguese higher education system, as well as, the assessment of its evolution.

Considering, that according to Grant's (2010) strategic framework, external and internal environment factors are expected to influence strategy elaboration, those factors will be examined (Grant, 2010).

Therefore, the context (external factors) in which Portuguese HEIs are inserted will be analyzed through assessment of political, economical, socio-cultural, technological and legal variables that affect its supply and demand. The internal environment of each HEI is also going to be analyzed focusing on the resources and stakeholders.

##### **3.1.1 Portuguese Higher Education System**

The Portuguese higher education system is a binary system composed by universities (composed by schools or departments from various fields), which provide more theoretical formation, and polytechnics, which provide more applied training (Amaral, Teixeira and Rosa, 2008).

Enumerating all the public universities in Portugal are: Universidade Nova de Lisboa, Universidade de Lisboa (resulting from a recent merger between Universidade Técnica de Lisboa and Universidade de Lisboa), Universidade de Aveiro, Universidade do Algarve, Universidade de Évora, Universidade do Minho, Universidade da Beira Interior, Universidade do Porto, Universidade de Trás-os-Montes e Alto-Douro, Universidade de Coimbra, Universidade da Madeira, Universidade dos Açores, and Universidade Aberta.

##### **3.1.2 Portuguese higher education – recent evolution**

Following, it will be analyzed the evolution of the Portuguese higher education system, as it still affects the institutions today, their organization, culture, and activities, and so, their strategy.

Portuguese higher education institutions faced a growing demand for several decades, which led to the need of introducing *numerus clausus* to control the costs in which the state incurred with HE. It also conducted to the creation of private institutions to satisfy the demand as the state did not provide places to all the candidates, whose number was increasing. Hence, private and public universities and polytechnics compose the Portuguese higher education system (Blatter et al., 2013).

The majority of the HEIs are located in the coastal and urban areas, existing a concentration of providers there (Amaral, Teixeira and Rosa, 2008).

However, demand started decreasing in the 90's until today, creating an excess capacity. This decrease in demand may be due to economic, demographic, political and social reasons (Vieira and Vieira, 2011). Hence, tertiary education levels are still low when compared to the ones of other European countries (Menezes, 2012).

### **3.1.3 Current challenges and trends in Portuguese Higher Education System**

Many challenges, resulting from changing market forces, are being imposed to higher education institutions in general, and to the ones in Portugal more specifically.

A great number of HEIs still has a process of institutional planning which is less structured than the one of firms. However, nowadays, volatile market forces impact HEIs, and to take advantage of the opportunities and to overcome the threats, they should adopt a strategic making process that is more similar to the one used in enterprises (Machado-Taylor, 2011).

HEIs are being confronted with a decrease in the number of traditional students, due to demographic reasons and lower percentage of enrollments. This poses HEIs with the need to attract more students. Therefore, the greater competition for students, together with the greater autonomy conceded, as well as, the unpredictability of the market put HEIs under the pressure for increasing differentiation of the offerings (Machado-Taylor, 2011). Hence, there is a trend towards greater importance of rankings, quality recognition concerns, marketing and communication activities (Vieira and Vieira, 2011) – it is occurring the marketization of higher education.

So it is possible to infer that there is a trend towards the vertical differentiation of universities (Beerkens-Soo and Vossensteyn, 2009).

But there is also a trend, even though not so pronounced, towards horizontal diversification, with the enlargement of the number and field of programs, faculty and graduated students (Blatter et al., 2013).

This expansion of demand desired may also be accomplished through the attraction of a greater number of mature students. This can be done through the design of part-time programs, online and distance learning in order to make learning more flexible (Beerkens-Soo and Vossensteyn, 2009). Accordingly, a challenge for HEIs is a more widespread use of practices of e-learning and b-learning to foster mature students participation (Machado and Gomes, 2011).

Furthermore, the expansion of the demand can also be achieved by attracting more international students (Blatter et al., 2013). Thus, there is also a tendency towards the internationalization of institutions, which has been facilitated by the bologna Reform, and which can be verified through the increasing recruitment of foreign students, the creation of campuses abroad, namely in Portuguese speaking countries (Angola, Brazil and Mozambique), and the incentives towards the mobility of students and staff (Blatter et al., 2013).

Besides, as some areas are more searched for by students and by the labor market than others, adjustments to supply have also been made. Some areas, such as education and agriculture, where there existed excess supply, and where there is lower capacity from the labor market to absorb people, decreased their offerings (Rego and Caleiro, 2011). Nevertheless, a challenge is still to prepare individuals with the competencies required by the labor market, given that there is still high unemployment among people with higher educational degrees.

Another challenge related to LLL provision consists of accomplishing the targets defined by the European Union for 2020 for education. The reaching of the target of having 40% of adults between 30-34 with higher education is still a challenge given that currently Portugal only has 26,1% of individuals in that age range with higher education. Portugal is still below the European Union average of 34,6% and far from the target defined (Conselho Nacional da Educação, 2012).

Consequently, it is possible to state that even though some current trends reflect an adaptation to the challenges posed due to external forces pressures, some adjustments still need to be made to respond to the constant changing environment HEIs are inserted in. Therefore, HEIs strategic decisions need to contemplate aspects such as

diversification of forms of income, internationalization, lifelong learning, student-centered learning paths, quality mechanisms, funding constraints and demographic trends.

### **3.1.4 Lifelong Learning in Portugal**

The concept of lifelong Learning defined at European level has, in the last years, been reinterpreted according to some country-specific characteristics, namely the lack of qualified people relatively to other European and OECD countries. Thus, policies and practices regarding LLL have been put into practice in a way that allows the reaching of some given objectives, such as the improvement of school's attainment levels of the population and the provision of qualifications demanded by the labor market.

Therefore, in Portugal, the creation of conditions to foster LLL opportunities was perceived as a way to foster national economic development through an increase in productivity and employment due to an increase in qualifications.

The method chosen to create these opportunities, implement them and monitor their quality was through the establishment of partnerships between the State, non-governmental agencies, providers of education and corporations. Some examples of agencies and projects created by the State are the National Agency for Adult Education and Training, Saber+ program, and the Novas Oportunidades program (Guimarães, 2013).

The Novas Oportunidades program, which was launched recently, was highly divulgated and focused on the recognition of prior learning as a way to increase the number of people who completed secondary education and were able to enter higher education.

A policy fostering LLL, namely mature students' entrance in higher education, and which is directly related to universities, is a regulation that allows that the entrance criteria to the first year of a degree in a HEI, for students who are older than 23 years old, is set by each institution instead of being the traditional national exam made to all students (Menezes, 2012).

At the time of its creation the regulation was successful, but its success has been decreasing, as it is possible to corroborate by the significant decrease in the number of individuals older than 23 years old that enrolled in higher education from 2010/2011

to 2011/2012 - from 10242 to 8231 individuals (Conselho Nacional da Educação, 2012).

Further, it is possible to verify that this measure has different repercussions in public and private universities, existing more mature students applying for private universities than for public ones. For the last three academic years the percentage of individuals older than 23 years old enrolled for the first time in the first year to the total of individuals enrolled was much higher in private universities (24% for the year 2010/2011) relatively to the one of public universities (5% for the same year 2010/2011) (Conselho Nacional da Educação, 2012).

Besides, LLL opportunities are also provided in universities through the access of mature students to master programs, doctorate programs, post-graduations, executive education, MBAs and shorter learning opportunities not conducive to certification.

These programs are becoming more known and appealing for people, as it is possible to verify by the increase in the number of individuals applying for masters and doctorate programs throughout the academic years of 2008/2009, 2009/2010 and 2010/2011 (Conselho Nacional da Educação, 2012).

As previously referred, partnerships are relevant to the provision of LLL in Portugal, with various stakeholders, besides the State, having an important role in creating initiatives and sharing their costs. Corporations are one of those stakeholders, through the provision of continuing training. It exists, however, a need for greater recognition of the learning occurred through these training initiatives, as many competencies acquired there are not yet recognized and validated (EAEA, 2011), and this would be relevant to assure that if individuals decide to engage in further training, they do not have to learn the same concepts again.

Although various improvements in the area of LLL have been achieved, there is still a long path ahead to enlarge the population with access to higher education opportunities. For example, the percentage of individuals in the age cohort of 25 to 29 years old as a percentage of the total number of individuals with tertiary education for each of these ages is very low, ranging from a maximum of 13,54% for people who are 25 to 6,23% for people who are 29 years old (Conselho Nacional da Educação, 2012).



### **3.1.5 External Environment – PEST Analysis**

The Portuguese external environment will be analyzed by examining the political, economical, socio-cultural and technological factors affecting Portuguese HEIs (PEST Analysis).

#### **3.1.5.1 Political Factors**

Concerning the political factors, the State intervention in higher education is mainly through funding and legislation, which change with political parties. In terms of funding, the system used is cost-sharing, where the government subsidizes part of the cost of a degree, and the student incurs in the other part of the costs (Amaral, Teixeira and Rosa, 2008). Public funding has been cut, and started being attributed according to specific conditions (Vieira and Vieira, 2011), due to the economic crisis and IMF adjustment plan.

Furthermore, the state is also the issuer of the regulations concerning employment in higher education institutions, and the requirements to access them (numerus clausus, minimum grade), limiting in this way their strategic decisions.

Besides, the educational policies the State defines for secondary education may also have an impact in the access to HEIs. For example, the policy to extend mandatory education until the 12<sup>th</sup> grade, allows to have more students in the condition to apply for higher education by fostering the reach of the 12<sup>th</sup> grade by a higher number of students (Vieira and Vieira, 2011). Another influential element is the legislation conferring more autonomy to HEIs. However, this autonomy is still low when compared to other European countries, and should be further increased according to the belief of some responsible people in the Portuguese HEIs (Blatter et al., 2013).

But not only policies at the national level affect the Portuguese higher education system. European level policies, such as the Bologna reform, the objective to create a Higher Education Area, and the aim to turn European societies into societies of knowledge, also influence HEIs strategic decisions.

#### **3.1.5.2 Economical Factors**

Various economical factors affect HEIs strategic decisions, being the most relevant, nowadays, the crisis. The crisis affects the employment levels and the purchasing

power of people, and so the willingness and capability to frequent further education opportunities. Unemployment may have a positive or a negative impact in the willingness of people to engage in LLL. The positive impact comes from the fact that high unemployment rates imply a lower opportunity cost of going to a HEI. The negative impact derives from the fact that unemployment also decreases the available income of people, reducing the possibility to frequent higher education. Another relevant economical factor is the cost people incur when going to a HEI, which decreased with the restructuration of the programs due to the Bologna Reform (Vieira and Vieira, 2011).

### **3.1.5.3 Socio-Cultural Factors**

Various socio-Cultural factors affect HEIs strategic decisions concerning LLL.

Firstly, students' preferences, such as their fondness for institutions closer to home, even though large and medium urban areas where HEIs are concentrated are very attractive to students, for the areas of business, law and economics (Amaral, Teixeira and Rosa, 2008), and for public institutions over private ones are influential factors (Rego and Caleiro, 2011).

Secondly, the majority of the candidates to Portuguese higher education are between 18 and 20 years old, leading to a population of students more composed by the traditional ones than by the mature ones (Vieira and Vieira, 2011).

Thirdly, the HEIs which are located in the interior of the country, demonstrate a strong regional focus, as put forward in their statutes, and so, have a great importance in regional development (Blatter et al., 2013).

### **3.1.5.4 Technological Factors**

In terms of technological factors, the technological development mostly affected HEIs through the allowance of practices of e-learning and b-learning (Machado and Gomes, 2011), permitting more flexible, in terms of space and time, learning environments (Machado, 2010 cited in Machado and Gomes, 2011). Some resistance has been demonstrated by the professors, concerning e-learning as it is perceived as a substitute for traditional learning. However, b-learning may allow the use of online tools to support traditional learning (Rodrigues, 2007 cited in Machado and Gomes, 2011).

In Portuguese higher education system, distance learning practices are not as disseminated as in other European countries, even though support systems such as Moodle and Blackboard are widely used. In Portugal the most advance HEI in distance learning is Universidade Aberta (Machado and Gomes, 2011).

### **3.1.6 Industry Analysis - Porter's Five Forces**

The external factors explained above affect the industry environment. Hence, they affect the bargaining power of customers (students) and of the suppliers (the Professors), the threat posed by new entrants and substitutes, as well as, the competitors (other providers of higher education) and so the rivalry within the industry (Grant, 2010). The Porter's five forces framework will be further developed for the higher education industry.

#### **3.1.6.1 Threat of substitutes**

In terms of threat of substitutes, programs offered by the different schools/departments within universities, may be perceived as substitutes of each other, even though there may exist some differentiation in their focus, international component or recognition. The programs offered by polytechnics may be perceived, to some extent, as substitutes of the ones offered by universities, but they are not perfect substitutes as they consist of different types of training. MOOCs (Massive Open Online Courses) are also imperfect substitutes. Besides, foreign economics and management schools may also be considered as providers of substitutes. In this way, the threat of substitutes is relatively high.

#### **3.1.6.2 Threat of entrants**

In what regards the threat of entrants, private HEIs can enter in the market, but this requires great investment and an increasing demand, contrarily to what happens nowadays when there is a situation of excess capacity. Besides, a new institution entering the market would have to develop a reputation and trust of quality among students, which HEIs already established already have. Hence, the threat of new entrants is relatively low.

### **3.1.6.3 Bargaining power of customers**

The bargaining power of customers (students) is enlarged by several factors, such as the diversity of offerings available, not only at national level but also abroad, and by the great amount of information available concerning the HEIs offerings. However, this bargaining power of customers relatively to each institution is diminished by the differentiation of the offers and by the fact that *numerus clausus*, other regulations and entrance requirements (such as interviews, tests, CVs) limit the numbers of places available. Therefore, the bargaining power of customers is moderate.

### **3.1.6.4 Bargaining power of suppliers**

The bargaining power of suppliers (Professors) is augmented by the limits concerning hiring and firing imposed by legislation, and by the number of HEIs to choose where to work, not only nationally but also internationally. So, the bargaining power of suppliers is relatively high.

### **3.1.6.5 Rivalry within the industry**

The rivalry within the higher education industry is diminished by the offering of differentiated products of very diverse players. Nevertheless, the presence of excess capacity, with supply exceeding demand, and the concentration of providers in the coastal and urban areas increases it, namely to the institutions situated in those areas. Thus, the rivalry within the industry is relatively high, as defended by Blatter et al., (Blatter et al. 2013).

### **3.1.7 Industry-Map – Key Stakeholders**

In addition to the analysis of the external factors, it should be performed one to the main actors in HEIs as they are also highly influential to the strategic decisions. Therefore, the most relevant stakeholders to economics and management schools/departments will be further portrayed together with their relevance.

The most relevant stakeholders to each economics and management schools/departments are: professors/faculty, students, the university to which it belongs, the government, other economics and management schools/departments, enterprises, Alumni (Alves, Mainardes and Raposo, 2010). European Institutions, media, non-governmental agencies.

Professors are one of the most relevant stakeholders in strategic choices. This is due to the fact that they are each school's most important strategic resource, as they are essential to the provision of the services offered and of the scientific knowledge produced (Alves, Mainardes and Raposo, 2010). In the value shop model (Stabell and Fjeldstad, 1998), they provide the solution to the problem posed by the students.

Students are also key stakeholders, given that in the value shop model (Stabell and Fjeldstad, 1998) they are the ones who define the problem to be solved. They are the reason of existence of the schools (Alves, Mainardes and Raposo, 2010). They affect mainly the design of the strategy content in order for the supply to be contingent on demand to assure the success of the programs. So, these stakeholders are related to two elements schools should consider when designing programs, their target groups and potential customers (Brandt, 2002).

The university to which the school belongs may limit the strategic decisions to some extent, which can be higher in cases where the autonomy of school/department is lower and decisions concerning some given aspects are more centralized.

The government is a stakeholder that conditions the strategic decisions through the regulations and policies, as these, influence the funding available, the capacity of the students to enroll in programs, and even the content of the programs. Other stakeholders that also limit school's strategy through regulations and policies are the European institutions. One important European influential policy was the Bologna Reform.

Competitors, such as other economics and management schools/departments influence, but also corporate universities, influence the strategy making by offering close substitutes (Brandt, 2002).

A stakeholder to consider as well, are corporations, as they are the ones that condition the characteristics searched for in students, but also, they may search for courses. Therefore, they are important stakeholders, as one of the LLL strategies chosen by schools may be the offering of courses held in enterprises (Brandt, 2002).

Another relevant stakeholder which a HEI has to be taken into consideration is the media, namely when deciding the communication strategy, as a good communication is essential to inform consumers of the different existing offerings, and affects the image of the school perceived by the stakeholders. Therefore, it is possible to conclude that business and economics schools are subjected to divergent goals and

interests of different parts, whose goals are all legitimate to the strategy of each organization and, so, they are inserted in a pluralistic context (Jarzabkowski and Fenton, 2006). The considerations of the goals and interests of the stakeholders by the schools allows the evaluation of the value of the services provided, as well as, the determination of ways to improve them (Alves, Mainardes and Raposo, 2010).

### **3.1.8 Internal Environment – Resources**

After examining in deep the external factors affecting the strategic decisions of HEIs, it will be examined the internal factors for each of the institutions, even though some may be similar across the schools studied. The internal factors to be examined are resources and capabilities, structure and systems, and goals and values also influence strategy design (Grant, 2010).

The analysis that will follow contemplates the analysis of the tangible/physical, intangible and human resources, together with the current offer and network of relationships for the 6 schools of the study.

Tangible/physical resources are examined, even though intangible and human resources and current offer, may prevail as aspects that influence individuals the most when choosing a place to study. The importance of the physical resources is related to location of the school, given that as previously mentioned it has a considerable weight in an individual's decision, namely in terms of distance from home, especially for mature students. From the human resources of the school, the Professors and the staff, there will be a focus on the Professors.

Besides examining the resources of the schools and the current offer, it is relevant to assess the way resources are organized and integrated by each institution, the internal development of institution's core capabilities, and the main principles that guide institution's strategy and its structure (Grant, 2010). However, this will not be exclusively done through the collection of secondary data. Interviews to faculty members will allow a better evaluation of them together with the way each institution perceives and reacts to the external factors previously examined.

### **3.2 Presentation of the Case studies**

#### **3.2.1 NOVA School of Business and Economics**

##### **Current Offer**

NOVA School of Business and Economics offers a great diversity of programs, such as undergraduate programs, pre-experience master programs in management, economics and finance, also Double Degree Programs and the CEMS MIM at the master level. Additionally, for students with experience it also offers full-time or part-time MBAs, PhDs and research opportunities (Nova SBE, 2013). Regarding executive education, it is provided by an independent structure Nova Forum, where various programs for mature students and organizations are offered, such as Management Programs, Executive Master Programs, and Corporate Learning Programs. The former consists of programs specifically designed for each organization taking into consideration its organizational culture and objectives. For Nova Forum three main principles serve as guidance: importance given to research, relationship with companies and the evaluation given to the programs offered. Nova also has the Angola Business School, which offers educational programs in Angola (Nova Forum, 2013). Nova SBE is also introducing new programs such as one to learn Portuguese as a business language performed in partnership with Forum Macau and a summer program that is, as well, centered on learning Portuguese as business language to whom is interested in markets such as Brazil, Angola and Mozambique. In terms of research nova has two knowledge centers: Nova Finance Center and Novafrika (Nova Africa Center for Business & Economic Development). It also offers support services, such as a career management office (Nova SBE, 2013).

##### **Physical Resources**

Nova's facilities are located in the centre of Lisbon, where all the undergraduate programs, masters, and research programs are located in the main building and the executive education, PhDs, MBAs and executive education are offered in an historical building, the Palacete Henrique Mendonça. Its physical location is valuable as it is situated in an urban area, and so where the number of students applying is higher.

### **Intangible Resources**

One important intangible resource to mention is Nova's recognition at national and international level. Nova possesses the Triple Crown recognition, EQUIS, AACSB, and AMBA accreditations (Nova SBE, 2010). Nova also ranks among the top business schools in various international rankings, such as the one of the Financial Times and of Eduniversal (Nova SBE, 2013). So, it is possible to state that Nova has a strong brand equity, which may be used to leverage new offerings.

Another important intangible resource is organizational culture. Nova's culture of excellence blends academic rigor with a practical application of the concepts learnt, being experiential learning an aspect emphasized in the programs, namely at the masters level and above (Nova SBE, 2010). Nova's culture is also one of proximity and interaction with the community is encouraged, to foster the development of soft skills through the engagement in volunteering activities (Nova SBE, 2010). Further, a strong international component is also present in Nova's culture with numerous foreign students and Professors, the encouragement of an international experience in the programs, all with the goal of facilitating integration in an increasingly globalized market place (Nova SBE, 2010).

### **Human Resources**

Regarding Nova's human resources, a good percentage of professors is from abroad or worked abroad, as well as, has worked for the government or in recognized Portuguese corporations, and comments in Portuguese newspapers and television (Nova SBE, 2010). This may allow that the experiences and learning transmitted may allow a better fit with today's volatile working marketplace.

### **Network of relationships**

Nova's network is composed by relationships with corporate partners, Alumni, and other schools.

In what concerns the Alumni network, there are around 12000 Alumni and there is the BeNova Community where former students can register and have discounts for executive education and for enrollment in additional courses, have career services available, and events to network with other Alumni. Nova aims to be part of the future educational choices of the former students (Nova SBE, 2013).



### **3.2.2 ISEG School of Economics and Management Lisbon**

#### **Current Offer**

ISEG School of Economics and Management Lisbon also offers a wide range of programs, namely undergraduate, masters and doctorate programs, and for executive education it offers postgraduate programs, an MBA, short courses and IDBA. Hence, its programs target various types of students, from the ones with no experience to the ones with experience and more mature students. The school also offers various programs and services that aim to develop students' soft skills, such as Boost your Talent, Cursos Livres, Mentoring and Career Management services. It also offers a Summer school. There also offered academic programs with Carnegie Mellon, MIT and Fraunhofer-IBERLog (ISEG, 2013).

#### **Physical Resources**

In terms of physical resources, ISEG's facilities are valuable as they are located in the centre of Lisbon, being that a factor of attractiveness for students, and they are modern.

#### **Intangible Resources**

One relevant intangible asset is its reputation at national level, assuring 90% employability to its students, and with various national companies recruiting there. Its international recognition is patent in the accreditation from AMBA, RICS and PMI, and its membership of AACSB and EFMD (ISEG, 2013). Another pertinent intangible resource is ISEG's culture, which is based in the commitment to achieve excellence, on solidarity and cooperation. There is also a strong international component, with internationalization being a strategic goal. There is the commitment to increase training options in English, and there are various programs performed in partnership with foreign schools, and the attraction of international students and professors (ISEG, 2013).

### **Human Resources**

Concerning ISEG's human resources, it is possible to verify that several of its Professors have worked to the State or comment Portuguese actuality. Besides, a great percentage of the docents are from abroad or have studied abroad.

### **Network of relationships**

In what concerns the Alumni network, ISEG has an association of former students, Alumni Económicas, whose objective is to foment the continuation of the relationship of the former students with the school. Alumni can benefit from training opportunities provided throughout the year and can be in close contact with current students through the mentoring program (ISEG, 2013).

### **3.2.3 Faculdade de Economia da Universidade do Algarve**

#### **Current Offer**

The Faculdade de Economia da Universidade do Algarve provides undergraduate programs, masters, specialization courses, and PhDs, which are targeted to a broad audience, with or without experience (FEUAlg, 2013).

#### **Physical Resources**

Concerning the school's physical resources, the facilities are located in the south of Portugal in a touristic region, known for its sea activities (FEUAlg, 2013). Although the physical location may attract a lower number of candidates relatively to urban areas, the location may attract people who are interested in studying economics and management of tourism and sea, due to the dynamics of the region on those fields.

#### **Intangible Resources**

Recognition at national level is mainly for the areas of sea and tourism (FEUAlg, 2013). The international component is not so strong as the communication is entirely in Portuguese. A culture of proximity may be implied from the fact that many professors studied previously in that school (FEUAlg, 2013).

### **Human Resources**

In what respects human resources, various Professors have a PhD from a foreign school, and others have their entire educational path in the school (FEUAlg, 2013).

### **Network of relationships**

In what concerns the Alumni network of FEUAlg, the school aims to keep track of former students professional paths, interact with them, encourage Alumni participation in school's main activities and, in this way, be closer connected to business world and better adapt the offerings. Former students should register in the portal created (FEUAlg, 2013).

## **3.2.4 Universidade de Évora - Departamentos de Economia e Gestão**

### **Current Offer**

In the University of Évora the departments of economics and management are relatively small, and, so, their offerings consist of various undergraduate programs (2 in management and 3 in economics), master programs (3 in management and 5 in economics) and doctorates (1 in management and 2 in economics) (Departamento de Economia da Universidade de Évora, 2013; Departamento de Gestão da Universidade de Évora, n.a.)

In what concerns the offering of continuing education, there is a department at the university level, NUFOR, whose objectives are the collection of information concerning labor market demands in terms of continuing training, the promotion and organization of programs of continuing education to the community in general and to the university's non-teaching staff. Besides, its goals also are the promotion of "cursos livres", summer courses, education courses and of the relationship with other universities in what concerns continuing education. This department works in close collaboration with other partners, and enterprises to assess the further training needs, namely for Alentejo region (NUFOR, 2008).

Research is performed in Centro de Estudos e Formação Avançada em Gestão e Economia da Universidade de Évora (CEFAGE-UE) (Departamento de Gestão da Universidade de Évora, n.a.).

### **Physical Resources**

In terms of physical resources, the departments are located in an historical building in the centre of the city, in the interior of Portugal. As in the case of university of Algarve the location may not be as attractive to potential students as the ones in urban areas. Besides, enterprises of some sectors may not consider that region as appealing as urban areas to install themselves. Nevertheless, the region may be attractive to the individuals interested in studying economics and management of the agro-alimentary and agricultural sectors, and to companies of those sectors.

### **Intangible Resources**

In terms of intangible resources, the culture is one of rigor, being the quality and efficacy of the programs based on systems of performance evaluation of professors, attribution of prizes to the top-performing students and an internship program that allows an easier placement in the labor market. There is a recognition of the research developed in the departments, with the Centro de Estudos e Formação Avançada em Gestão e Economia da Universidade de Évora (CEFAGE-UE) being classified as excellent by an international jury to the Fundação da Ciência e Tecnologia (FCT). Various research projects are funded by international and Portuguese external organizations such as the European Commission, QREN and FCT (Departamento de Economia da Universidade de Évora, 2013; Departamento de Gestão da Universidade de Évora, n.a.).

### **Human Resources**

Concerning the school's human resources, there is an increasing number of professors with a PhD degree provided from national and international universities.

### **Network of relationships**

In what concerns the Alumni network the department of economics of university of Évora tries to collect the experiences of former students in a page of its website, and has a Facebook page as well, to foster the relationship between actual and former students (Departamento de Economia da Universidade de Évora, 2013).

### **3.2.5 Faculdade de Economia do Porto (FEP) – Universidade do Porto**

#### **Current Offer**

The Faculdade de Economia do Porto (FEP) offers several programs for each of the Bologna cycles undergraduate programs, masters and PhDs. Executive education is offered by Porto Business School, which is a separate identity that results from a partnership between FEP and several enterprises. FEP also hosts a research center that conducts theoretical and applied research in the economics and finance fields.

In terms of continuing education besides the offering of post-graduations, masters, and PhDs, FEP also offers occasional training activities (workshops, seminars, among others), and specific training courses such as the ones destined to prepare students to enter in a master degree (for example GMAT Preparation courses, data analysis and data-mining) and “cursos livres”. So, further education opportunities are provided by both FEP and Porto Business School (an independent structure). Current students are also offered career-counseling services. International students are provided a tutoring service (FEP, 2013).

#### **Physical Resources**

The school’s facilities are located in a campus, which is located near various other schools and research centers and in an urban area in the north of Portugal (FEP, 2013), being in that way valuable.

#### **Intangible Resources**

One important intangible resource is reputation. The school is recognized as of high quality, namely it belongs to QTEM and PRIME Network, is a member of EFMD and AACSB. It is also important to refer that Porto Business School to which FEP is tightly connected is present in Financial Times ranking and has various accreditations, namely AMBA and EPAS (FEP, 2013).

#### **Human Resources**

Regarding human resources, 90% of school’s faculty has a PhD and a great part is highly recognized and studied abroad (FEP, 2013).

### **Network of relationships**

In what concerns FEP's Alumni network, former students can register to receive news about events, initiatives, and remain connected to FEP, as well as, to other former students. Alumni also benefit from a career management service, which offers continuing education opportunities, counseling about change in career path or career improvement prospects (FEP, 2013).

In what concerns corporate partners FEP has a permanent relationship with 2300 enterprises, and 3 enterprises per day search for candidates in the "Employment List" (Bolsa de Emprego) of the school (FEP, 2013).

### **3.2.6 Faculdade de Economia da Universidade de Coimbra**

#### **Current Offer**

The school offers several programs at the undergraduate level and above with the offering of post-graduations, masters and PhDs. In what concerns the offering of continuing education it is offered by Escola de Estudos Avançados (School of Advanced Studies), which is responsible for the offering of masters, PhDs and post-graduations that are developed in an innovative perspective in close interaction with society. The design of the programs takes into account the international context, public policies, and corporate world (Universidade de Coimbra, 2013). So, continuous education and link to the working world is a priority, with great attention being given to career support services and the offering of learning opportunities to working people. The school also has an Association for University Extension (Associação para a Extensão Universitária -APEU), which functions in close collaboration with labor market and offers training initiatives and courses for business people, managers and technicians, and performs applied studies in the domains of study of FEUC (APEU, n. a.). There are several research centers linked to FEUC, such as CECES (Centro de Estudos Cooperativos e da Economia Social), CCIM (Coimbra Center for Innovative Management), GEMF (Grupo de Estudos Monetários e Financeiros), among others.

### **Physical Resources**

The school's facilities are located in a city in the center of Portugal, Coimbra, and which was considered World Heritage. University of Coimbra's campus, in which the school is inserted, is one of the oldest ones in Portugal (Universidade de Coimbra, 2013).

### **Intangible Resources**

One important intangible resource is the school's culture, which is one of proximity and open-mind, but at the same time demanding.

### **Human Resources**

The professors are from very diverse fields and have studied abroad.

### **Network of relationships**

The network of corporate partners functions as a way for students to be in close contact with labor market, but also allows FEUC to offer learning opportunities that respond to partners' needs. The network of Alumni (Rede de Antigos Estudantes) also favors this contact of students with working people who are former students of the school (Universidade de Coimbra, 2013).

## **Chapter 4: Results and Discussion**

### **4.1. Results Presentation**

In this chapter are presented the results of the interviews in the form of two transversal analyses (interviews are presented in Portuguese and English from Appendix 6 until Appendix 16).

One of the analyses focuses on the strategy content and the other on the strategy process. The transversal analysis concerning the strategy process is composed by five categories, and the transversal analysis concerning the strategy content is composed by three categories, which are based on the ones of the transversal analyses of the ALLUME Project from EUCEN (de Viron, Feutrie and Filloque, 2011b).

In the strategy process the categories are:

- Internal and external drivers influencing LLL strategies
- The main actors of LLL strategizing
- The LLL strategizing process characteristics and development steps
- The strategic tools and methods used for LLL strategizing
- The LLL strategizing product communication

In the strategy content the categories are:

- Vision, mission, motivation and values
- Challenges and objectives
- Organization for LLL strategies implementation

#### **4.1.1 Transversal Analysis**

##### **4.1.1.1 Strategic Process**

###### **4.1.1.1.1 Internal and External drivers influencing LLL strategies**

After examining the data in the interviews regarding the drivers affecting LLL strategies, it is possible to infer that in what concerns external drivers 4 schools (out of 6 schools) referred financial limitations imposed by the government as influential in strategy elaboration. So, the crisis the country is going through, as well as, the IMF adjustment program caused significant cuts in state expenditure in higher education, and a reduction in the families purchasing power, reducing the possibilities of the students to frequent higher education, affecting HEIs strategies. The crisis also caused



a rise in unemployment, and that may have a negative impact on students' willingness to enroll in any program. Legislation - Politics is also mentioned by one schools (out of 6 schools) as an important influence to strategy design. The reason mentioned is the rigidity of legislation. One school also referred the regulations at the university level as influential as they constrain autonomy. Besides, one school refers European policies as an important driver, namely for the first initiatives of further education performed. One school also referred the demographic trends, and another school referred the duty to society as two important external drivers for LLL strategizing.

Concerning internal drivers, Professors' knowledge was mentioned as influential by 2 schools. This is, supply is conditioned by the area of expertise of Professors. So, for example there may be limitations in supply due to limitations in hiring Professors according to momentum requirements in terms of areas of expertise. Another internal driver referred, was the school's structure. The location of the school was referred by 2 schools (out of 6 schools), namely by schools situated outside the urban areas of Lisbon and Oporto, as an important influence in determining the offerings. Besides, the size of the school, was mentioned by three schools as relevant in strategic decisions. Furthermore, three schools referred demand for further education as an important internal driver. One school also referred change in the organization (internally) as a driver, with the occurrence of the reorientation of the school.

It is difficult to find a consensus among schools regarding which factors prevail as strategically influential, the internal or the external, with two schools referring the prevalence of external factors, three schools referring the prevalence of internal factors and one school referring the existence of a balance between the two.

#### **4.1.1.1.2 The main actors of LLL strategizing**

Data available concerning the schools was analyzed regarding the main actors influencing LLL strategizing.

In what regards, internal actors, professors are referred by four schools as relevant actors in the strategic process. In one school it is referred that their influence is mainly through the scientific council, so as decision-makers, affecting content design and decision, similarly to what happens in the programs for the traditional students. In other three schools, Professors are mentioned as decision-makers, but also as do-ers, that plan the content and that put it into practice. The school's management is referred

as an influential actor as decision-maker. The rectory is also considered an important actor by two of the schools, where there is greater university power due to higher centralization of decision. Three schools refer the Alumni as a relevant stakeholder, not only as potential future students, and so, they started to be considered more relevant by various schools, existing the aim to strengthen the links and interaction with this network to foster the coming back of students to improve their knowledge.

Furthermore, for four of the schools, there is a specific unit responsible for part of continuing education activities (independent structure). This was referred in the interviews by some of these schools but was also determined through research of secondary data. Two schools referred students' strategic importance, mainly through students' representatives and through the auscultation of their opinions concerning the programs and teaching.

Regarding external actors, corporate partners are also considered by all of the schools (6 out of 6). In the interviews they are referred as stakeholders' whose opinion counts, and so they are influential people as they affect employability of the programs, help to ensure students have the capabilities required by the labor market, but also, in some cases are considered as an important customer given that people from the companies can invest in further education in the school.

As another external actor, government is referred by four schools (out of 6 schools) as an influential actor that affects strategy not only through funding (referred by three of those four schools), but also through the value that gives to education and so the importance of engaging in further education that it transmits to the population (referred by one of the schools).

Three schools also mention other schools/ universities as important actors, through partnerships provided.

#### **4.1.1.1.3 The LLL strategizing process characteristics and development steps**

After examining the interviews for strategizing process characteristics it is possible to conclude that the process has both informal and formal aspects. The informal aspects are mainly due to the fact that strategy elaboration takes into account interaction with society, but also the school's culture, either more externally/market oriented or not, existing a great openness to listen to Professors opinions before deciding, as all schools referred (collegial elements), as well as, other stakeholders, who are also

listened, such as corporate partners and students, to assure a fit of the offer with the demand from students and with the one of labor market.

The formal aspects are mainly related to the inclusion of LLL offerings in strategic plans and the holistic view of the majority of the schools. This last aspect is due to the fact that all the schools referred the offering of further learning opportunities together with the offering of opportunities for the traditional target, being it difficult to identify staff specifically related to LLL, with various members of faculty involved in initial and continuing education. However, in four of the schools, there is an independent structure that is responsible for part of the activities regarding LLL, being responsible for executive education. For two of those cases the independent structure is for the university as a whole.

Another formal aspect of the process of strategizing for all the 6 schools is the cooperation with other schools and companies, with the elaboration of partnerships to design programs.

One formal aspect of the LLL strategizing process is the staff participation in LLL. Regarding staff participation in LLL activities, one striking aspect is that schools do not devote enough attention and resources to foster the engagement of staff in LLL initiatives. However, one school mentioned that the learning needs of the staff are assessed and that they have the possibility to improve knowledge if they desire so. Besides, two other schools referred that growth opportunities for staff are available.

Hence, in terms of development steps of the strategizing process, in what concerns the analysis of the situation it is not based on deep formal research about mature students motivation, except for one school. The design of the process is mainly based on exploitation of existing networks by all the 6 schools, either with corporations, other schools or Alumni, and involvement of faculty. For the 6 schools in what concerns implementation, the final strategic decisions are taken at the top, after listening to various stakeholders' opinions, and then communicated to the rest of the school. For the 6 schools the implementation of further education initiatives has been mainly through extension of current offerings and through adaptation of existing offer, through new delivery methods. Besides, one aspect common to all the schools is the fact that offerings are transversal, this is, people from different backgrounds than economics and management can look for further education in those areas, and there is also the possibility for the students in the programs offered to do courses from

different fields, even in other schools of the same university. The priorities set differ among schools, with five schools referring that they want to offer various programs to the same students throughout their life, this is, they aim to attract people to the school from the beginning of their study path and track them after leaving to attract them in the future to go back to the school to improve knowledge. Yet, there is one that believes change is good for students, and so its focus is in the offering of programs throughout life to different students. Concerning Recognition of Prior Learning (RPL) one school sees it with cautiousness, existing an emphasis that quality has to be assured in cases where it occurs, and so, it is rarely done. However, one school refers its provision for masters and the other for MBAs and when a student with a degree before Bologna comes back to the school to engage in further learning.

There is not much information in the interviews concerning the evaluation of the offerings, even though one school refers that programs are continued or discontinued based on their performance, given that programs with low demand are closed. Through secondary data it is possible to understand that quality of the programs is assessed by external organizations to assure the schools accreditations and quality recognition.

#### **4.1.1.1.4 The strategic tools and methods used for LLL strategizing**

The analysis of all the interviews allowed the conclusion that there is a great variety of strategic tools used. However, no school mentioned the systematic use of tools, and the reference to the use of them was mainly indirect throughout the interview.

Firstly, the use of the strengths and weaknesses, opportunities and threats, (SWOT Analysis) is also common, with four schools justifying certain strategic decisions based on their strengths and opportunities they recognize in the market, and settling the aim to be the best in a given area as they possess the resources (it is a strength) to be the best in that area. So, each school attempts to leverage its strengths in terms of resources, expertise and recognition in a given field, and invests in it, to be the best in that area. It is more pertinent to the schools the area they position themselves than the target group to which the offer is directed, this is, in various cases each school has, as one main goal to have good reputation in a certain area investing in offering it for various targets, being less important if they are traditional students or not. For example, the economics school of Algarve wants to be recognized in the area of

tourism and sea, as it has the resources, such as the location, to be the best in it, wanting to offer it to various age groups.

Thirdly, customer relationship management tools (CRM tools) are also used by four schools, to auscultation of students' and companies' opinions and gathering of feedback relatively to the offerings, as well as, tracking students' path. One school refers the use of CRM tools to track students throughout life, to try to attract them to come back and invest in further education.

Fourthly, quality assessment methods are also used in all the schools, being given high relevance to international rankings presence and accreditations, as well as, membership of external organizations.

Fifthly, strategic plans are also used, with one school even referring that they are presented to corporate partners to obtain feedback.

Further, the formal collection of statistical data is also cited by one school, as being of great relevance to obtain quantitative data, namely concerning future demand, to decide the programs to offer. Besides, in what concerns special services to learners, in the six cases services are available to all students, traditional and more mature. In two cases there is a reference to the need to improve the support services provided. Still, in one school there is the perception that traditional students look more for the support services than more mature students, existing, however, an increase in the search for support services by more mature students for professional reorientation. In addition, the use of an independent structure for the offering of some services of continuing education is referred. In the case of Faculdade de Economia do Porto, some activities of continuing education are offered by Porto Business School, which is a separate structure from FEP. Also in the case of department of economics and management of Universidade de Évora, there is a separate unit, which is responsible for continuing education in general at university level, even though the department has its own offers. For Nova there is the Nova Forum and for Faculty of Economics of University of Coimbra there is the School of Advanced Studies. A mentoring system is also provided by two of the schools, being it, however, not available to all the students.

Firstly, the strategic technique mostly used is the benchmarking, as all schools set their position relatively to others in certain areas.

Besides, it is possible to infer that one used by all the schools is the multi-field approach with the existence of bridges between the programs offered, being possible

the students able to make transversal movements across fields of study, from post-graduations to masters, for example. Another technique is the reinforcing of the networking with the strengthening of collaboration with partners being it a focus to 3 of the schools.

#### **4.1.1.1.5 The LLL strategizing product communication**

Regarding the communication of the strategizing process there is a great diversity of opinions among schools. One school considers it is of strategic importance. Another school considers it needs to be improved to be able to reach the target more easily. One other school considers that due to the size of the school it is not a priority, even though there is a great investment of school's resources on it, even though the department of communication is at the university level. One school refers the tailoring of communication means and initiatives through a close contact between communication department and other departments in the school to have specific information concerning the target of the communication. One outstanding aspect is that all schools communicate the initiatives through a wide variety of means. The means used vary from most traditional ones, such as press, website and alumni organization, to the most innovative ones, such as mobile ads. Besides, the way offerings are communicated is mainly through events, conferences, seminars and fairs.

#### **4.1.1.2 Strategy Content**

##### **4.1.1.2.1 Vision, mission, motivation and values**

After analyzing the interviews it is possible to infer that motivations vary across schools. One school mentioned as a motivation the demand from the society that people constantly update their knowledge to fit in the labor market. The Bologna Process, that shortened the first cycle degrees, and introduced the masters and doctorates in a different perspective they were understood before, is also referred by one school as a reason for engaging in further learning opportunities. Another, more implicit motivation, was the demand for the school. This is, if the number of non-traditional students looking for the school's programs, is higher than the one of traditional students, programs would be design to attract them.

#### **4.1.1.2.2 Challenges and objectives**

Regarding the main challenges and goals for the schools, three schools consider the goal to strengthen the partnerships, namely with the Alumni. Besides, it should be emphasized that the widening or consolidation of the offerings above undergraduate that all schools define as an objective, is not to target only non-traditional students, but also to any person who is interested. It is important to also state that many schools referred as an objective to be the best and focus the offerings in a given area in which they were already recognized, such as research or tourism, aiming to attract any target group to that offer. In one case, it is even considered that the offering to traditional students in the case of the masters should be the focus, even though there are offerings to more experience public. One challenge that should be highlighted, and was referred by only one school, is the attempt to demonstrate the public the potential benefits of engaging in further learning. Another challenge and objective mentioned by two schools, is the reorientation of the schools to adapt to the new targets and the increase in the offerings above the undergraduate level.

#### **4.1.1.2.3 Organization for LLL strategies implementation**

It is possible to infer that institutional organizational structures vary considerably among schools, with some schools having the continuing education services more integrated with traditional services provision than others. However, the predominant organization is the existence of more than one unit, one that offers traditional services and services adapted to the mature students, and other that provides mainly executive education. This requires the coordination between units to assure the creation of a school where LLL strategy is deeply implemented and continuing education is integrated with the offerings to the traditional students.

#### **4.1.2 Survey's Results**

Further are presented some of the results of the survey that are most relevant to provide recommendations (Survey's results are presented in Appendix 17). More than 70% (74% of respondents) of people answering the survey said they were unwillingly to engage in further education in the areas of economics and management. The majority of the reasons put forward for their unwillingness to engage in more learning opportunities are no interest in those fields (34% of respondents), financial motives

(23% of respondents) and lack of time (19% of respondents). The majority of the reasons to engage in further education are to improve career prospects (59% of respondents) and motives of professional development (55%). The type of further education preferred is quite diverse, existing, however, a preference for strategy area (37% of respondents) followed by finance and accounting (20% of respondents). In what concerns the place where people search for more learning opportunities the most referred was Internet (43% of respondents) followed by near universities and institutes (21% of respondents).

#### **4.2 Discussion of the transversal analyses**

After these two transversal analyses where the common and different aspects of strategy content and process were put forward, it is possible to understand that there is an increasing awareness for the demand for LLL initiatives and an attempt to fulfill that demand. Nevertheless, LLL strategies are not fully implemented, in some schools, and some demand is fulfilled through some slight adaptations to existing programs, such as through different scheduling of provision.

Therefore, taking the six strategies put forward by Ellen Brandt (2002) to Norwegian universities to meet diversified market demands for continuing education, it can be inferred that Portuguese economics and business schools focus on the strategy “same content with flexible delivery” (part-time programs for example), having also some elements of the strategies “interdisciplinary master’s degrees” (master degrees for experienced students) and as well, for some of the schools, “interdisciplinary courses for new markets”, “tailor made on commission” (programs for companies adapted to their needs and culture) and “research news for professionals” (Brandt, 2002). There is no considerable investment in “adapted specialization”. Besides, in several of the cases previously mentioned, the offerings are not widely publicized. Another major aspect to be put forward is the close interconnection between LLL activities and initial education, for example with the blending of traditional students (following a program) and experienced students (following that program but on part-time for example).

Concerning organizational culture, taking the model of Quinn and McGrath (1985) (Quinn and McGrath, 1985 cited in Ferreira and Hill, 2008), it is possible to infer that the schools display strong elements of adhocracy, as they demonstrate considerable



flexibility and description and strong external focus. This is due to the fact that external drivers were referred as substantially influential in strategy (for 3 of the schools more important than the internal drivers), but also because 2 of the schools referred the need to be able to constant evaluate the offerings according to market demands and reaction to them, and all the schools referred partnerships as highly important. This external focus and flexibility are in accordance to the hypothesis put forward by Ferreira and Hill (2008) that public universities would show a stronger tendency to adhocracy given the tough conditions they are being subjected to, and all these schools belong to public universities (Ferreira and Hill, 2008). Through the previous arguments it can also be inferred that there is some tendency to a more market-oriented governance structure, a “marketization of higher education”, and some improvements towards a more student-centered provision. There is also a clear stakeholder orientation patent in the importance given to partnerships and to listening to stakeholders’ opinions.

Therefore, in terms of the stages of integration of LLL strategies defined by Smidt and Sursock (2011), it is possible to verify that schools are moving from stage two to stage three, due to the increasing tendency towards student-centered provision and design of offerings.

There is also clear evidence that economics and business schools are inserted in a pluralistic context, affected by external contradictory forces that condition strategies by pressing towards a more efficient allocation of resources, to an increasing presence in rankings, and to comply with labor market demands, as defended by Jarzabkowski and Fenton (Jarzabkowski and Fenton, 2006).

There is also a clear need for improvements to enlarge engagement in LLL namely in terms of VPL, communication of initiatives and their benefits.

There is a mixture of proactive and reactive initiatives, with some being created by own initiative, for example, after the Bologna Process initiation, and others as a way to satisfy demand.

Furthermore, the study allowed to conclude that most of the schools try to follow a given student population throughout life, with the returners being an important target of LLL initiatives. Hence, the main growth strategy followed is product development (offer new programs to the same target). There is, however, also diversification, new

programs to a new target, with schools trying to capture people from different backgrounds than economics and management to do further education in that field.

European Policies relating to LLL also seem to have an impact on schools LLL strategies. European policies had an impact on LLL strategies through the Bologna Process that regulates degree's structure and comparability and compatibility, across fields of study and countries, allowing for some transversal offer and mobility. Also, at the European level degree's quality recognition is relevant, and the schools referred a concern towards this, but more to assure credibility to all stakeholders.

Portuguese regulations are also influential to LLL strategizing due to the fact that state funding is still relevant and public higher education institutions actions are still quite limited by legislation. Nonetheless, the importance of state funding is decreasing relatively to other revenue sources, and is starting to be attributed according to some criteria, emphasizing the movement towards a more market-oriented governance structure. However, state funding should be more closely linked to output of each school, as defended by the European Commission.

Following, some recommendations will be provided concerning lifelong learning strategies.

### **4.3 Recommendations**

One recommendation may be an enlargement in the offer of “cursos livres “, this is, an increase in the offering of courses that the student can do according to personal or professional needs and preferences. This would allow each person to design her/his own learning path, by choosing subjects from different degrees or from the same one but that correspond to the knowledge needed to be developed – allowing the schools to be more learner-centered, and attract more non-traditional students by overcoming the problem of some students in which none of the offerings available corresponds to the existing learning needs.

Another recommendation is that schools give greater attention to human resource management of their staff. From the interviews, it was possible to understand that there is no consistent encouragement of staff engagement in learning opportunities, being this left to each person's criteria. The staff involvement in LLL would allow the building of a stronger LLL culture in schools, allowing them to be recognized and become models in that field.

Another recommendation is that the use of the strategic tools and techniques is done in a more systematic and integrated manner. The use of strategic tools seemed more implicit and informal, and not linked to specific tasks. It would be valuable if each tool usage was related to tasks, for example some tools would be more related to situation appraisal, other to strategy selection and others to strategy implementation. There should also be some tools used to constantly evaluate the strategies implemented so that these are constantly adapted to the constantly changing needs of the society regarding higher education.

A strategic tool that can be more used is one related to market segmentation, that should be more better performed, as there is no evident segmentation of the offers in most cases, with an offering being just slightly adapted to be offered to a different target. So, a better segmentation of the offers should be done.

A further recommendation that can be valuable for the schools is the fostering of cooperation between them, as a way to increase value to the programs offered to non-traditional students by adding them the possibility of mobility inside the country. Non-traditional students may not be as interested in going abroad as traditional students, due to the fact that they may have a family or be working, but they may be interested in frequenting others schools in Portugal. In this way, closer cooperation among Portuguese schools would allow for students to move between Portuguese schools, and so, to have different perspectives in one field or have a greater diversity of subjects to choose.

In the recommendations for practitioners it is also important to take into consideration the results of the survey conducted to potential students (all Portuguese people who may be willing to take further education in the areas of business and economics).

One important result of the survey was that more than 70% of the people who answered the survey (74%) said they were not willing to take further education in those areas. The implications for practice may be that various reasons are perceived as impediments to engage in further education and the strategy of the schools has to contemplate ways to overcome those barriers so that people feel incentivized to engage in LLL. Those barriers could be assessed by the question that was following posed to the people who answered they were unwilling to take further education. In that question a great percentage of people said the reason for the unwillingness were financial motives (23%). This was immediately followed by another great percentage

of people who stated lack of time to perform it (19%). So, these two motives referred by possible lifelong learners have to be addressed by the schools to assure that they are able to attract more interested students. A suggestion is that their strategy includes programs at a lower cost even if they have to be shorter programs that do not concede a diploma, taking into consideration the lower available income for that purpose that people may have at times of crisis like the current one. Besides, the flexibility of the programs is another aspect that should be taken into consideration when deciding the strategy content, as programs should permit the conciliation of professional and personal lives and not only be slight adaptations of the programs from the ones targeting traditional students. Further, another reason mentioned for the unwillingness to engage in further education in those areas was the interest in another area (34%). This can probably be overcome by an effective communication strategy that clearly, not only informs of the variety of offerings available, but also, of their potential benefits to prospective students. So, in the strategizing process, considerable importance should be given to the communication of the benefits students may have after pursuing further education in those areas, such as improve career prospects, salary, among others, given that in tough times like the actual one there is high concern for the instrumental benefits of this decision.

Moreover, another suggestion is that schools design tailored communication channels to be able to respond to potential students in a quick and customized way, assuring the clarification and overcoming of doubts and concerns to assure that they understand they will have the adequate support during the program.

Some recommendations can also be drawn from the answers of the people who demonstrated interest in pursuing further education in the areas of economics and management. The most important aspect was that incentives from the employer was referred by only a small percentage of the respondents (14%), even though the possibility of career improvement was the most chosen argument to be willing to engage in further education. So, this may imply that employers are not conceding employees with all the conditions required to engage in further learning opportunities, and schools should try to overcome this. One interesting way would be to perform partnerships with employers to provide customized courses to employees, assuring the value of the course not only to the employee but also to the company itself (this is already done by some schools but it is not common or greatly divulgated).

Another suggestion that can be drawn from the answers to the survey is related to the teaching method. Even though several authors argue that online learning is a great way to enlarge the pool of learners that might not be the best strategy to follow by the schools. This is due to the fact that only a small percentage (6%) of the people answering the question for the preferred method of teaching chose online. Hence, blended learning may be the best approach given that 46% of people answering the question referred it as the preferred method, and almost 50% of people chose on-site learning. So, MOOCs might not be the best solution to adopt in a LLL strategy and may not be a strong threat as a substitute.

## **Chapter 5: Conclusion**

### **5.1. Main conclusions**

In terms of strategy process, there is no consensus in what concerns the schools' choice of drivers influencing LLL strategies. Regarding the actors involved in the strategizing process, it is possible to understand that all schools take into consideration various stakeholders in their strategizing process. The management body and the Professors of the school are the main actors in the strategizing process, existing a great influence (although implicit through demand) of students, and of corporate partners. This reflects a tendency from state oriented towards a more market-oriented governance structure. Regarding the use of strategic tools and techniques, the information was obtained in a more implicit way, being, however, possible to infer from the various interviews that tools used are very diverse, even though no reference to a systematic and integrated use of them was made. Partnerships are perceived as essential to the offer of LLL opportunities, as well as, to its communication and to the attraction of students, which demonstrates some tendency to the "marketization of higher education". Regarding strategy content, the diversity of programs' provision is considerable in all schools/departments interviewed, existing from the programs that confer a certification to the ones that do not, to ones more tailored to each person needs, to the ones less tailored, with just some adaptations. Concerning this last aspect, it is worth noting that the degree of student-centered provision varies across schools/departments. Motivations and goals of the schools and departments also vary considerably, being noticeably conditioned by the internal resources, even though external elements also affect this.

Concluding, it is important to restate that this study main aim is to examine the commonalities and differences in LLL strategies of Portuguese economics and business schools, as well as, to provide some general recommendations based on good practices. In this way, it is not an endeavor to compare schools or indicate best or worst performances, as there is no unique path for all, given that each school is inserted in a specific context and has its own particular characteristics, culture and purpose. Yet, it should be underlined the fact that the study brought further information concerning LLL strategies in Portuguese higher education, namely in economics and business schools and departments. The majority of the studies already

performed concerning this topic, use as unit of analysis the university. However, schools can be an interesting unit of analysis (as done in this study), as LLL may not be equally developed in all schools/departments of the same university. There may exist different environmental and/or internal factors affecting each school, leading to the fact that an analysis at the university level may be too broad by not contemplating these differences across fields of study. Besides, this study brings further insights of which environmental factors and internal motivations affect Portuguese economics and business schools' LLL strategies, as well as, future paths. Another possible contribution may have been that it possibly encouraged some reflection among higher education decision-makers concerning LLL.

Lastly, it is important to note that this study has some limitations that will be presented next.

## **5.2 Limitations**

A first limitation is that generalizations to the conclusions should be faced with caution, as this study consists of the analysis of specific cases, economics and business schools/departments, inserted in a specific context, the Portuguese context. The second limitation is derived from the fact that only one interview per school/department was performed (Saunders, Lewis and Thornhill, 2009). The performance of more than one interview would have permitted to obtain a collective perspective over the same situation.

However, this study may provide a starting point to engage in further research.

## **5.3 Further Research**

One interesting future research would be to perform a similar study to Portuguese polytechnics, as polytechnics attract different publics than public universities, due to the fact that their offerings are more applied and so are perceived as being more closely linked to the labor market.

Another future study worth of noting would consist in the elaboration of an analogous research but also including Portuguese private universities. This would be relevant to compare between private and public universities' strategies in terms of diversity and characteristics of the offerings, progress done in last years, and also the way of strategizing.

Besides, a similar study for universities of other Southern European Countries would be relevant to verify the similarities and differences of LLL strategies across countries. This would be interesting because there are some common social, cultural and economical elements among these countries, and so, it would be remarkable to empirically test if these similarities have an alike effect in terms of schools' lifelong learning strategies; or if on the contrary, there are other aspects such as policies or historical evolution of the educational system that caused divergence in terms of school's LLL strategies.

Many more interesting studies in this area could be pointed out as the research in this field, as well as, the awareness concerning its importance to universities and higher education institutions, in general, are still developing.



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## Appendices

### Appendix 1

**Figure 1: 25 Most Popular Tools according to the study of Rigby & Bilodeau (2011)**

• Balanced scorecard	• Enterprise risk management*	• Satisfaction and loyalty management
• Benchmarking	• Knowledge management	• Scenario and contingency planning
• Business process reengineering	• Mergers & acquisitions	• Shared service centers
• Change management programs*	• Mission and vision statements	• Social media programs*
• Core competencies	• Open innovation	• Strategic alliances
• Customer relationship management	• Outsourcing	• Strategic planning
• Customer segmentation	• Price optimization models	• Supply chain management
• Decision rights tools	• Rapid prototyping*	• Total quality management
• Downsizing		

\*Tool added to the survey in 2011

**Source:** Rigby, D., Bilodeau, B. (2011) Management tools and Trends, 2011, Bain & Company



## **Appendix 2: Guião da Entrevista**

Esta tese de mestrado é sobre as estratégias de LLL (oportunidades de aprendizagem ao longo da vida) das faculdades de economia e gestão em Portugal e o objectivo desta entrevista é recolher informações relativamente à estratégia de LLL desta faculdade.

1. Por favor descreva a missão e visão da escola em termos de LLL
2. Por favor identifique os principais objectivos da faculdade em termos de LLL.
3. Por favor descreva o processo (passos para a implementação de iniciativas e/ou estratégia de LLL) e progresso em termos de LLL na faculdade nos últimos 10 anos. Indique e explique as maiores decisões tomadas.
4. Por favor indique os maiores resultados em termos de LLL alcançados nos últimos 10 anos (alguns exemplos podem ser desenvolvimento de programas/cursos e serviços de suporte para lifelong learners, parcerias que promovam iniciativas de LLL, internacionalização, entre outros).
5. Por favor indique os maiores desafios em termos de LLL que ocorreram nos últimos 10 anos e como foram ultrapassados
6. Por favor explique como planeia atingir os objectivos acima mencionados.
7. Por favor indique as maiores tendências e factores que influenciam a elaboração da estratégia desta faculdade em termos de LLL.
8. Por favor indique quais são as maiores forças e fraquezas da faculdade em relação a financiamento e a forma de alavancar essas forças e de ultrapassar essas fraquezas

9. Por favor indique quem considera serem os principais intervenientes no processo de decisão e como este é formulado.
10. Por favor indique se existe staff que seja LLL staff. Existe possibilidade e incentivo para que esses trabalhadores realizem actividades de LLL?
11. Que parcerias considera essenciais para a realização de iniciativas de LLL?
12. Por favor indique como são comunicadas as iniciativas de LLL.
13. Por favor indique a que grupo(s) de alunos são as ofertas mais direccionadas.
14. Por favor indique quais os grupos de alunos mais interessantes para a faculdade e os motivos para tal.
15. Por favor indique que serviços de suporte são prestados aos vários grupos de alunos e o quão efectivos na obtenção de resultados.
16. Por favor elabore uma análise SWOT da sua faculdade para determinar a capacidade desta em ser uma escola de LLL, baseando-se em todas as informações previamente discutidas.

Faculdade:

Posição do entrevistado:

### **Appendix 3: Interview Script**

This master thesis is about business schools' LLL (learning opportunities throughout life) strategies and the aim of this interview is to collect data concerning the LLL strategy of this school.

1. Please describe the school's vision and mission concerning Lifelong Learning
2. Please identify the school's main goals regarding LLL
3. Please describe the process (steps to the implementation of lifelong learning initiatives and/or strategy) and progress in terms of Lifelong Learning in the school over the last ten years. Indicate and explain the main decisions taken.
4. Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).
5. Please identify the main challenges that occurred over the last ten years in the process and progress in terms of LLL and the way they were surpassed
6. Please explain how you plan to reach the goals regarding Lifelong Learning referred in question 3
7. Please indicate which trends and factors have an influence in your school's strategy elaboration
8. Please explain what are the school's main strengths and weaknesses in terms of funding and the way to enhance the strengths and to overcome the weaknesses.

9. Please indicate who are the main actors in decision-making and how is that decision-making process formulated
10. Please indicate if there is any staff that is LLL staff. Is there the possibility and encouragement for the staff to engage in LLL activities?
11. Which partnerships are essential to the performance of Lifelong Learning initiatives?
12. Please indicate how are your LLL initiatives communicated.
13. Please indicate at which target groups are your LLL activities directed.
14. Please explain which target groups are the most interesting for your faculty and the reasons for that.
15. Please indicate which support services are provided to the target groups abovementioned and how effective are they in achieving their results
16. Please elaborate a SWOT analysis for your school to determine the institution's ability to be a Lifelong Learning school, based on all the information previously defined.

School:

Position of the interviewee:

#### **Appendix 4: Questionário**

**1. É português?**

Sim

Não

**2. Pretende investir em formação no futuro nas áreas de Economia ou Gestão?**

Sim

Não

**3. Se NÃO pretende investir em mais formação, indique as razões:**

Devido a razões financeiras

Porque esta exige disponibilidade que não tenho neste momento

Porque ainda não encontrei uma que considere adequada/interessante

Porque estou interessado(a) noutra área

Outro (Especifique):

**4. Se PRETENDE investir em mais formação, escolha as razões que o levam a ter este objectivo.**

Por motivos de desenvolvimento pessoal

Por motivos profissionais – incentivo por parte do empregador

Por motivos profissionais – para melhorar perspectivas de carreira

Por me encontrar desempregado

Outro:

**5. Se PRETENDE investir em mais formação, indique por favor que tipo de formação.**

Doutoramento

MBA

Mestrados

Pós-graduações

Formação Executiva

Cursos de Formação Específicos

Workshops/Conferências

**6. Se PRETENDE investir em mais formação, indique por favor a área específica.**

Estratégia

Logística/Operações

Marketing

Recursos Humanos/ Organização

Finanças ou Contabilidade

Outro (Especifique):

**7. Como procura mais informação sobre possíveis oportunidades de formação?**

Redes sociais

Jornais

Junto de universidades, institutos, formadores

Junto do empregador

Internet

**8. Por favor indique o que pensa das ofertas actuais das Faculdades de Economia e Gestão em Portugal, classificando as seguintes frases de 1 (discordo plenamente) a 5 (concordo plenamente).**

Boa relação qualidade-preço

As ofertas correntes podiam ser mais diversificadas

A comunicação das ofertas devia ser mais visível

As ofertas ainda são mais direccionadas para estudantes com pouca experiência

**9. Quanto considera ser o preço adequado a pagar pela formação que pretende fazer?**

<500€

500-1000€

1000 – 2500€

2500 – 5000€

5000-10000€

10000-15000€

15000-20000€

>20000€

**10. Qual o modelo de ensino que considera mais adequado para a formação que deseja fazer?**

Ensino Presencial

Ensino online

Ensino misto/blended (online e presencial)

**11. Qual a forma de ensino que considera mais adequada por parte do docente na formação que deseja realizar?**

Mais prática – mais aplicada

Mais teórica – mais solidez teórica

**Caracterização da amostra**

**12.Por favor indique a sua formação.**

Licenciatura

Mestrado

Doutoramento

**13.Qual a sua área de formação?**

Economia

Gestão

Finanças

Marketing

Engenharia

Psicologia

Ciências Sociais (Filosofia, Sociologia)

Medicina

Educação

Desporto

Direito

Outro:

**14. Por favor indique a universidade onde fez o seu último nível de formação.**

Universidade pública

Universidade privada

Instituto politécnico público

Instituto politécnico privado

**15.Sexo**

Feminino

Masculino

**16.Faixa Etária**

21-25

26-30

31-35

36-40

41-45

46-50

>50



## **Appendix 5: Survey Script**

### **1. Are you Portuguese?**

Yes

No

### **2. Do you pretend to invest in further education in economics or management?**

Yes

No

### **3. If you DO NOT PRETEND to invest in further education in economics and management please indicate the reason(s):**

Due to financial reasons

Due to not having time availability

Due to interest in other areas/fields of knowledge

Because I am not interested in doing any other further education

Another (Specify):

### **4. If you DO pretend to invest in further education in economics and management please indicate the reason(s):**

Due to motives of personal development

Due to Professional reasons - incentives from the employer

Due to Professional reasons - to improve career prospects

Because I am currently unemployed

Another (Specify):

### **5. If you DO pretend to invest in further education in economics and management please indicate in which type of education:**

Post-graduations

Master

PhD

MBA

Executive Education

Specific training courses

Workshops/Conferences

**6. If you DO pretend to invest in further education in economics and management please indicate the area:**

Strategy

Logistic/Operations

Marketing

Human resources/ Organization

Finance or Accounting:

Another (Specify):

**7. How do you search for more information concerning further education opportunities?**

Social networks

Newspapers

Near universities, institutes

Near the employer

Internet

**8. Please indicate what you think about the current offerings of the Portuguese economics and management schools in Portugal by classifying from 1 (completely disagree) to 5 (completely agree) with the following sentences.**

Good relation quality-price

The current offerings could be more diversified

The communication of the offerings should be more visible

The current offerings are still directed to people with few or no experience

**9. How much do you consider to be the right price to pay for the further education you desire?**

<500€

500-1000€

1000 – 2500€

2500 – 5000€

5000-10000€

10000-15000€

15000-20000€

>20000€

**10. Which teaching model do you consider the most adequate?**

On-site learning

E-learning

Blended learning

**11. Which teaching method do you consider the most adequate?**

More practical

More theoretical

**Sample characterization**

**12. Please indicate your level of education.**

Undergraduate

Master

PhD

**13. Please indicate your area of studies:**

Economics

Management

Finance

Marketing

Engineering

Psychology

Social Sciences (Philosophy, Sociology)

Medicine

Education

Sports

Law

Another (Specify):

**14. Please indicate the type of university where you did your last studies:**

Public University

Private University

Public Polytechnic

Private Polytechnic

**15. Gender**

Male

Female

**16. Age Group**

21-25

26-30

31-35

36-40

41-45

46-50

>50

## **Appendix 6:**

### **Entrevista ao Professor Fernando Cardoso da Faculdade de Economia da Universidade do Algarve (que pertence à direcção)**

**Esta tese de mestrado é sobre as estratégias de LLL (oportunidades de aprendizagem ao longo da vida) das faculdades de economia e gestão em Portugal e o objectivo desta entrevista é recolher informações relativamente à estratégia de LLL desta faculdade. Por favor indique a missão e visão da faculdade relativamente a LLL.**

Existe falta de autonomia financeira entre a Reitoria e as escolas na Universidade do Algarve, sendo os resultados positivos da escola de economia apropriados pela Reitoria e utilizados para saldar saldos negativos de outras escolas. Isto limita a estratégia da escola de economia através da limitação dos recursos financeiros disponíveis. Nomeadamente limita a contratação de professores estrangeiros, e portanto o processo de internacionalização da escola. No entanto, existe autonomia para o estabelecimento de diversos aspectos como por exemplo a elaboração de programas.

A estratégia de Lifelong Learning está incluída na estratégia geral da escola uma vez que os programas são flexíveis e direccionados para alunos de várias faixas etárias. Alguns programas para serem adaptados às necessidades do alunos que trabalham são leccionados ao fim-de-semana.

**Por favor indique os maiores resultados em termos de LLL alcançados nos últimos 10 anos (alguns exemplos podem ser desenvolvimento de programas/cursos e serviços de suporte para lifelong learners, parcerias que promovam iniciativas de LLL, internacionalização, entre outros).**

A estratégia da escola foca-se em oferecer vários programas para vários públicos alvo, licenciaturas, mestrados, doutoramentos e pós-graduações, onde há uma orientação da aplicação dos conteúdos teóricos à área do turismo e mar. Assim a escola utiliza a sua localização para diferenciar os serviços oferecidos, uma vez que competição directa

baseada nos mesmos factores com as universidades situadas na capital seria difícil obterem vantagem competitiva. Entre as várias áreas existe muita transversalidade, permitindo ao estudante estabelecer o percurso académico que mais se adapta a si.

**Por favor indique as maiores tendências e factores que influenciam a elaboração da estratégia desta faculdade em termos de LLL.**

O processo estratégico deveria ser mais baseado em análise do mercado, e não tanto elaborado como resposta a factores externos, que se revelam mais importantes que factores internos à escola na elaboração da estratégia. Os factores externos com maior relevância são as restrições ao nível de financiamento causadas pela falta de autonomia relativamente à universidade, o financiamento do governo, a localização da escola numa região turística e próxima do mar, o poder económico dos alunos, bem como a quantidade de alunos que procuram a escola.

Como factores internos, são mais importantes a não existência de capacidade para contratar professores estrangeiros, e a forte cultura organizacional.

**Por favor identifique os principais objectivos da faculdade em termos de LLL.**

Como objectivos futuros, a escola deseja focar-se mais na economia e gestão (bem como nas diversas áreas da gestão marketing, contabilidade) do turismo e mar, e na internacionalização, desejando captar alunos estrangeiros. Contudo, isto requer a contratação de mais professores estrangeiros, que está limitado pela falta de autonomia ao nível do financiamento. A escola já oferece cursos só em inglês para estrangeiros.

A diversificação de programas de economia e gestão relacionados com áreas como o turismo sénior pode ser uma oportunidade de expansão. Bem como a expansão da oferta de programas ao nível do mestrados, pós-graduações e doutoramentos que, ao contrário das licenciaturas, não são limitados pelos *numerus clausus*.

Assim sendo a escola pretende definir uma linha estratégica em que oferece serviços para dois tipos de público-alvo, os estrangeiros e todas as pessoas que desejem estudar economia e gestão do turismo e mar, seja qual for a faixa etária.

**Que parcerias considera essenciais para a realização de iniciativas de LLL?**

As parcerias, com bancos, empresas e outras escolas são essenciais para a realização de diversos programas, e portanto para uma estratégia de diversificação de oferta. As parcerias com empresas da região são comuns e importantes para formar quadros para a região e fomentar a participação de pessoas das empresas nos programas da escola. Isto concede à escola prestígio como entidade formadora na região.

**Por favor indique quem considera serem os principais intervenientes no processo de decisão e como este é formulado.**

A elaboração da estratégia, ao nível da decisão de conteúdo é feita de forma informal e onde os diversos professores da escola tem poder de decisão, assim sendo é muito horizontal. Ao nível da decisão de alocação dos recursos financeiros, o processo é top-down uma vez que a decisão pertence à reitoria que depois comunica às faculdades.

**Quantas pessoas estão envolvidas na elaboração e oferta de iniciativas de LLL? Existe possibilidade e incentivo para que esses trabalhadores realizem actividades de LLL?**

Em termos da formação do próprio corpo docente existem incentivos para que os assistentes façam formação até serem doutorados.

**Por favor indique como são comunicadas as iniciativas de LLL.**

A comunicação de iniciativas de Lifelong Learning, e iniciativas em geral uma vez que os vários programas estão disponíveis para as várias faixas etárias, não é considerada como um aspecto extremamente relevante da estratégia uma vez que a escola tem uma dimensão pequena, mas é feita através de flyers, conferências, website, actividades junto das empresas e word-of-mouth. Esta comunicação é realizada através de iniciativa própria da escola, recorrendo a recursos internos como

a participação de professores da área de marketing, embora o gabinete de comunicação das várias escolas pertença à reitoria.

**Por favor indique que serviços de suporte são prestados aos vários grupos de alunos e o quão efectivos são na obtenção de resultados.**

Os serviços de suporte a alunos tem de ser mais desenvolvidos, sendo que para alguns alunos a colocação e prospecções de carreiras são essencialmente feitos através das parcerias que a faculdade estabelece com empresas da região no sentido da realização de alguns programas que implicam a integração do aluno na empresa a certo ponto.

**Por favor elabore uma análise SWOT da sua faculdade para determinar a capacidade desta em ser uma escola de LLL, baseando-se em todas as informações previamente discutidas.**

Strengths: Ser pequenos e reconhecidos como bons na área do turismo e mar

Weaknesses: Pouco desenvolvimento de serviços de suporte aos alunos

Opportunities: Internacionalização da escola

Threats: Falta de financiamento que limita a possibilidade de internacionalização



**Appendix 7: Interview to Professor Fernando Cardoso of the school of business and economics of University of Algarve (who participates in the directive board)**

**This master thesis is about business schools' LLL strategies (learning opportunities throughout life) and the aim of this interview is to collect data concerning the LLL strategy of this school. Please describe the school's vision and mission concerning Lifelong Learning**

There is a lack of independence between the rectory and the schools in university of Algarve, being the positive results of the economics school appropriated by the rectory and used to compensate the negative results of other schools. This constrains the strategy of the school due to limitation of financial resources available. More specifically, for example, it limits the hiring of foreign teachers and so the school's internationalization process. However, there is autonomy in the designing of various aspects, namely the school's programs.

Lifelong learning strategy is included in the overall strategy of the school given that the programs are flexible and directed to students from various age groups.

Some programs to be adapted to the needs of working students are lectured on weekends.

**Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).**

The school's strategy is focused in offering various programs to various targets, undergraduate, masters, PhDs, where there is an orientation towards the application of the concepts to the fields of tourism and sea. In this way, the school uses its location to differentiate its offers from the ones of the competitors, given that in a competition based on the same factors with schools from the capital would be very difficult to obtain competitive advantage. Between the different fields there is a lot of transversal movements, allowing each student to build a path that most suits him/her.

**Please indicate which trends and factors have an influence in your school's strategy elaboration**

The strategic process should be more based on market analysis, and not so much as a response to external factors demands, which reveal more important than school's internal factors in strategy elaboration. The external factors with major importance are financial restrictions caused by the lack of autonomy in financial terms relatively to university, government funding, the location of the school in a touristic region near the sea, the purchasing power of students, as well as, the number of students that are interested in the school.

As internal factors, the most important ones are the lack of capacity to hire foreign Professors and the strong organizational culture.

**Please identify the school's main goals regarding LLL.**

As main future objectives, the school aims to focus more in economics and management of the tourism and sea (as well as in the various areas related to management such as marketing, accounting), and in the internationalization, aiming to attract more foreign students. However, this requires the hiring of more foreign Professors, which is limited by the lack of financial autonomy. The school already offers degrees only in English to foreigners.

The diversification of programs of economics and management related to senior tourism may be a strong opportunity for expansion. As well as, the expansion in the offering of programs at masters, post-graduations, and PhDs, which, contrarily to what happens in the undergraduate, are not limited by numerus clausus

Hence, the school pretends to define a strategic line in which services are offered to two distinct targets, the foreigners, and everyone that wishes to study economics and management of the tourism and sea, whatever its age group.

**Which partnerships are essential to the performance of Lifelong Learning initiatives?**

The partnerships with banks, companies, and other schools are essential to the performance of various programs, and so for a diversification of the offerings. The partnerships with companies from the region are common, and important to form qualified people for the region, and foster the participation of people from those companies in school's programs. This concedes the school prestige as a education entity in the region.

**Please indicate who are the main actors in decision-making and how is that decision-making process formulated.**

The strategy elaboration, at the level of content decision, is made in an informal way, and the various Professors of the school have decision power, being in this way very horizontal. At the level of the allocation of resources, the process is top-down, given that the decision belongs to the rectory, which then communicates it to the schools.

**Please indicate if there is any staff that is LLL staff. Is there the possibility and encouragement for the staff to engage in LLL activities?**

In terms of formation of the docents, there are incentives so that assistants continue education till they are doctorates.

**Please indicate how are your LLL initiatives communicated.**

The communication of lifelong learning initiatives, and of the initiatives in general given that the various programs are available for diverse age groups, is not considered an extremely important aspect, as the school has a small dimension; but it is done through flyers, conferences, websites, activities near the companies and word-of-mouth. This communication is performed by school's initiative, resorting to internal resources, such as the participation of Professors from the marketing department, even

though the communication department is common to the various schools (of the University of Algarve) belonging to the rectory.

**Please indicate which support services are provided to the target groups abovementioned and how effective are they in achieving their results**

The support services for the students should be further developed. For some students the allocations and career prospects are made through partnerships that school establishes with companies of the region in order to perform programs that imply the integration of the students in the company at some point.

**Please elaborate a SWOT analysis for your faculty to determine the institution's ability to be a Lifelong Learning school, based on all the information previously defined.**

Strengths: Be small and recognized as good in the field of economics and management of the tourism and sea

Weaknesses: Small development in the student support services

Opportunities: School internationalization

Threats: Lack of funding that limits the hiring and so the internationalization

## **Appendix 8:**

### **Entrevista ao Professor Jacinto Vidigal da Silva da Universidade de Évora (pró-reitor da Universidade de Évora)**

**Esta tese de mestrado é sobre as estratégias de LLL (oportunidades de aprendizagem ao longo da vida) das faculdades de economia e gestão em Portugal e o objectivo desta entrevista é recolher informações relativamente à estratégia de LLL desta faculdade. Por favor indique a missão e visão da faculdade relativamente a LLL.**

A estratégia em termos de Lifelong Learning não é separada da estratégia geral da escola, sendo desenhados programas para o estudante convencional e depois adaptados para satisfazerem as necessidades de outros estudantes.

**Por favor indique as maiores tendências e factores que influenciam a elaboração da estratégia desta faculdade em termos de LLL**

Os factores internos influenciam mais fortemente a estratégia do que os factores externos, uma vez que os primeiros condicionam o ajustamento entre a oferta e a procura. Os factores internos com maior relevância são os recursos existentes, nomeadamente em termos de docentes, e a expectativa interna de procura. Os factores externos mais relevantes são a legislação, a região em termos de desenvolvimento e demografia, e o financiamento proveniente do governo.

**Por favor identifique os principais objectivos da faculdade em termos de LLL.**

A oferta de cursos para um público diferente do público-alvo tradicional (dos 18 aos 23 anos) é vista como uma forma de crescimento e diversificação da oferta.

Na estratégia é também dada grande importância à área de investigação, que já é reconhecida como sendo de excelente qualidade a nível nacional e internacional, através de por exemplo o centro de investigação CEFAGE. Assim sendo, a

investigação é uma área à qual é dada prioridade, bem como à internacionalização, sendo ambas vistas como oportunidades de crescimento.

**Por favor indique os maiores resultados em termos de LLL alcançados nos últimos 10 anos (alguns exemplos podem ser desenvolvimento de programas/cursos e serviços de suporte para lifelong learners, parcerias que promovam iniciativas de LLL, internacionalização, entre outros).**

Em termos de conteúdo são oferecidos diversos programas, licenciaturas, mestrados, pós-graduações, doutoramentos, numa lógica de fileira. Isto é procura-se oferecer os diversos programas aos mesmos estudantes, ao longo da vida. Os vários programas estão muito integrados.

**Por favor indique quem considera serem os principais intervenientes no processo de decisão e como este é formulado.**

A elaboração da estratégia é muito informal, incluindo muito a visão da reitoria, sendo o processo de decisão top-down.

**Por favor indique que serviços de suporte são prestados aos vários grupos de alunos e o quão efectivos são na obtenção de resultados.**

Não existe uma grande variedade de serviços de suporte ao estudante, sendo essencialmente através de dinâmica com associação académica.

**Por favor indique como são comunicadas as iniciativas de LLL.**

Ao nível de comunicação de iniciativas é necessário melhorar, pois embora exista muita informação disponível no website este não é user-friendly.

**Quantas pessoas estão envolvidas no elaboração e oferta de iniciativas de LLL? Existe possibilidade e incentivo para que esses trabalhadores realizem actividades de LLL?**

Existe um departamento de formação contínua ao nível da universidade o NUFOR, que elabora opções de formação ao longo da vida para funcionários e público em geral.

**Que parcerias considera essenciais para a realização de iniciativas de LLL?**

As parcerias com empresas e outras universidades são importantes para a provisão de mestrados e doutoramentos. Um exemplo é o Master Delta, realizado em parceria com a empresa Delta.

**Por favor elabore uma análise SWOT da sua faculdade para determinar a capacidade desta em ser uma escola de LLL, baseando-se em todas as informações previamente discutidas.**

**Strengths:** A pequena dimensão torna o processo de decisão e a implementação mais ágil

Parcerias com empresas

**Weaknesses:** Plano estratégico e processo de decisão pouco estruturados/informais

**Opportunities:** Características da região

Mercado Europeu à disposição

**Threats:** Financiamento do governo

Legislação devido a rigidez da regulamentação

**Appendix 9: Interview to Professor Jacinto Vidigal da Silva of University of Évora (pro-rector)**

**This master thesis is about business schools' LLL (learning opportunities throughout life) strategies and the aim of this interview is to collect data concerning the LLL strategy of this school. Please describe the school's vision and mission concerning Lifelong Learning**

The lifelong learning strategy is not separate from the overall strategy, being the programs design for the conventional student and then adapted to satisfy the needs of other students.

**Please indicate which trends and factors have an influence in your school's strategy elaboration.**

The internal factors are a stronger influence for the strategy elaboration than the external ones, because the first ones condition the adjustment between the supply and the demand. The internal factors with greater relevance are the existing resources, namely in terms of docents, and the internal expectation of demand. The external factors with greater relevance are legislation, the region, in terms of development and demography, and the funding from the government.

**Please identify the school's main goals regarding LLL.**

The supply of degrees for a different target than the traditional target (from 18 to 23) is seen as an opportunity for expansion and diversification of the offerings.

In the strategy, it is also given great importance to the research area, which is already known for its excellent quality, nationally and internationally, through, for example the research center CEFAGE. In this way, research and internationalization are also seen as opportunities for growth.

**Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support**



**services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).**

In terms of content various programs are offered, degrees, masters, post-graduations, PhDs, in a logic of a row. This is, there is an attempt to offer diverse programs to the same students across life. The various programs are highly integrated.

**Please indicate who are the main actors in decision-making and how is that decision-making process formulated.**

The elaboration of the strategy is very informal, including the vision of the rectory, being the decision process top-down.

**Please indicate which support services are provided to the target groups abovementioned and how effective are they in achieving their results.**

There is not a great variety in terms of student's support services, being this done, essentially, through the academic association.

**Please indicate how are your LLL initiatives communicated.**

There is the need to improve communication of the initiatives, cause although there is a lot of information available in the website, it is not user-friendly.

**Please indicate if there is any staff that is LLL staff. Is there the possibility and encouragement for the staff to engage in LLL activities?**

There is a department of continuing education at the university level, the NUFOR, which creates lifelong learning programs to staff and public in general.

**Which partnerships are essential to the performance of Lifelong Learning initiatives?**

Partnerships with companies and other universities are important to the offering of masters and PhDs. An example is the Master Delta, made in partnership with the company Delta.

**Please elaborate a SWOT analysis for your faculty to determine the institution's ability to be a Lifelong Learning school, based on all the information previously defined.**

**Strengths:** The small dimension of the school makes the decision and implementation processes more flexible

The partnerships with companies

**Weaknesses:** Strategic planning and decision process not very structured/highly informal

**Opportunities:** Region's characteristics

European market at disposition

**Threats:** Funding from government

Rigidity of the legislation

**Appendix 10: Interview to Professor Daniel Traça Nova School of Business and Economics (vice-dean of the school)**

**This master thesis is about business schools' LLL strategies (learning opportunities throughout life) and the aim of this interview is to collect data concerning the LLL strategy of this school. Please describe the school's vision and mission concerning Lifelong Learning.**

There is no separate strategy for Lifelong Learning. The strategy of the school consists of the offering of various programs to different targets.

**Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).**

Various programs such as undergraduate programs, masters, PhDs, MBA, and executive education are offered. They are offered mainly not to former students but to new students, this is there is no attempt to follow the same students throughout life. What exists is an offer of different programs to different targets throughout the various stages of life. There is a focus around core competences of the school and the offerings are designed around them.

**Please identify the faculty's main goals regarding LLL.**

So there is a focus on undergraduate programs and pre-experience masters, and so on the traditional students, and not on mature students. However there are opportunities for further education for other targets through the PhDs, MBA, and executive education, but they are not the focus in terms of strategic decisions. Besides, there will be further development of programs to people throughout their lives through leadership programs, one-day programs and part-time programs.

**Please indicate who are the main actors in decision-making and how is that decision-making process formulated.**

The strategy process is very informal, based on discussion among faculty members, school management, taking into consideration students' opinion, and also accreditations and rankings, being in this way the benchmarking also an important element in strategy elaboration. There exists the willingness to improve the importance of Alumni and of corporate partners. The process of collecting data is rather informal than formal. The decision-making process is top-down, with the main actors being among the internal actors, the professors and decision-makers, and among the external actors the decision-makers such as the government.

**Please indicate which trends and factors have an influence in your school's strategy elaboration.**

External and internal factors equally influence the strategy elaboration.

**Is there the possibility and encouragement for the staff to engage in LLL activities?**

The provision of opportunities for staff development is not systematic, not existing a strong human resources policy. This is conditioned due to small size of school.

**Which partnerships are essential to the performance of Lifelong Learning initiatives?**

Partnerships, with other schools and corporate partners, are highly relevant to the school provision of initiatives.

**Please indicate how are your LLL initiatives communicated.**

The various initiatives of the school are communicated through email, social media, smartphone applications, and also newspapers more sporadically.

**Please elaborate a SWOT analysis for your faculty to determine the institution's ability to be a Lifelong Learning school, based on all the information previously defined.**

**Strengths:** Huge openness to change  
Close to students

**Weaknesses:** Strategy formulation is not sufficiently structured, being very informal  
There are not enough human resources development initiatives

**Opportunities:** Quality of life and academic winning proposition  
Ahead of the game in Portugal

**Threats:** Government, which provides an important part of funding, is bankrupt  
Unfavorable conditions of the labor market

**Appendix 11: Entrevista à Professora Ana Paula Africano da Faculdade de Economia do Porto da Universidade do Porto (FEP) (Subdirectora da FEP) com a Dr.<sup>a</sup> Marta Barbosa**

**Esta tese de mestrado é sobre as estratégias de LLL (oportunidades de aprendizagem ao longo da vida) das faculdades de economia e gestão em Portugal e o objectivo desta entrevista é recolher informações relativamente à estratégia de LLL desta faculdade. Por favor descreva o processo (passos para a implementação de iniciativas e/ou estratégia de LLL) e progresso em termos de LLL na faculdade nos últimos 10 anos. Indique e explique as maiores decisões tomadas.**

A faculdade claramente com o processo de Bolonha apostou na oferta de mestrados de especialização, que são mestrados para estudantes com experiência profissional. Assim houve uma motivação interna para apostar nestes programas de LLL, encorajada pelo processo de Bolonha. Simultaneamente apostou na formação executiva isto é, formação contínua e não conferente a grau. Esta formação é oferecida pela Porto Business School, que resulta de uma parceria entre a FEP e empresas. A Porto Business School tem uma estratégia própria separada da FEP.

**Por favor identifique os principais objectivos da faculdade em termos de LLL.**

Há uma aposta na oferta de cursos livres, isto é, cursos que podem ser realizados por pessoas com percurso profissional existente de forma a alargarem os seus conhecimentos. Estes cursos podem ser realizados avulso de acordo com os conhecimentos que as pessoas pretendem aprofundar.

Existe como objectivo aprofundar relações com a rede Alumni com o objectivo de dinamizar a formação de LLL, e aumentar as parcerias com empresas para a difusão de iniciativas.

**Por favor indique os maiores resultados em termos de LLL alcançados nos últimos 10 anos (alguns exemplos podem ser desenvolvimento de**

**programas/cursos e serviços de suporte para lifelong learners, parcerias que promovam iniciativas de LLL, internacionalização, entre outros).**

Os mestrados especializados da FEP que funcionam em horário pós-laboral e a possibilidade de frequentar unidades curriculares de vários mestrados que permite uma formação à medida de cada pessoa e dos seus interesses profissionais. Apostar na internacionalização ao nível dos mestrados (em termos de oferta já está estável). A oferta já está bem segmentada em pré-experience e pós-experience. Agora o objectivo é participar em parcerias internacionais de qualidade. Estudantes com experiência também têm a possibilidade de ir para o estrangeiro estudar, mas isto é mais procurado pelos estudantes sem experiência. Existem processos de acreditação e de reconhecimento de conhecimentos em pós-graduações e mestrados, mas sempre tendo como base o rigor e portanto são muito pontuais (concessão de alguns ECTS em situações muito pontuais). Existe também um sistema de créditos livres com a possibilidade de realizar disciplinas noutras faculdades da Universidade do Porto.

**Por favor indique os maiores desafios em termos de LLL que ocorreram nos últimos 10 anos e como foram ultrapassados**

Nos últimos anos houve uma reorientação estratégica, uma orientação recente (de 2008) para se passar de uma escola de licenciaturas para uma escola de mestrados. Existe o objectivo de que o número de alunos de mestrado ultrapasse em breve o número de alunos de licenciatura, existindo um intake de 600 alunos de mestrado por ano. Portanto foi uma aposta bem sucedida com desenvolvimento positivo a ver pela evolução no número de candidatos a mestrado. O número de candidatos não diminuiu com o aumento da propina de aproximadamente 50 % em dois anos.

A oferta de lugares nos mestrados está condicionada pelos limites impostos pela Universidade do Porto mas escola pode fazer propostas, que tem feito, e têm sido bem aceites. Existe preenchimento total das vagas de mestrado com elevado número de candidatos que ficam sem colocação.

**Por favor indique as maiores tendências e factores que influenciam a elaboração da estratégia desta faculdade em termos de LLL.**

Com mais recursos fariamos mais coisas. A restrição orçamental está presente. Mas a escola tem um drive muito forte para utilizar recursos acumulados de uma forma proactiva, isto é, usar recursos já existentes de forma mais eficiente. Reorganização e consolidação são dois aspectos fundamentais a ocorrer. 50% do financiamento provém do governo e os outros 50% advêm de receitas próprias, grande parte de propinas e outra parte menor de receitas essencialmente de applied reserach.

**Por favor indique quem considera serem os principais intervenientes no processo de decisão e como este é formulado.**

Sistema de governança interna é colegial (incluindo docentes, não docentes, alunos e empresas de forma mais indirecta). Existe uma grande participação dos professores, nomeadamente do conselho científico na clarificação e segmentação da oferta com base em dados específicos sobre a procura. Por exemplo recentemente um mestrado foi encerrado como resultado de baixa procura.

A opinião dos estudantes é tida em conta através de grupos de associativismo estudantil uma vez que a escola tem contacto privilegiado com grupos estudantis, alguns muito ligados a áreas específicas, como por exemplo o FEP Finance Club. Todos os mestrados têm comissão de acompanhamento por parte dos estudantes, o que acaba por ter influência na elaboração da estratégia. Empresas não participam directamente mas são stakeholders importantes aos quais é apresentado o plano estratégico de curto-médio prazo para obtenção de feedback. Existe um conjunto integrado de elementos de decisão e gestão.

O processo de decisão é estruturado, existindo grande relevância de informações quantitativas (existe conjunto de métricas relevantes que são consideradas).



**Existe possibilidade e incentivo para que esses trabalhadores realizem actividades de LLL?**

Existe um plano de formação contínua de recursos humanos. As necessidades são identificadas e podem ser sinalizadas que pela escola quer pelo colaborador. A escola procura recolher informação junto dos trabalhadores relativamente a áreas de conhecimento que considerem que gostariam de ver melhoradas.

**Por favor indique como são comunicadas as iniciativas de LLL.**

Rede Alumni é muito importante na comunicação de iniciativas e as newsletters também. Existe em Março uma feira de mestrados para atrair estudantes, embora seja mais atractiva para estudantes tradicionais. Também através de órgãos de comunicação especializados, como as redes sociais. O gabinete de comunicação trabalha com cada departamento dos mestrados para determinar os meios de comunicação específicos para melhor comunicar com os profissionais para cada área. Nos mestrados de especialização existem alunos de outras origens escolares, como direito, engenharia, psicologia, sociologia e relações internacionais (sendo aproximadamente a proporção de 50%). Alguns já a trabalhar, outros a reorientarem-se para melhor fit no mercado de trabalho.

**Por favor indique que serviços de suporte são prestados aos vários grupos de alunos e o quão efectivos na obtenção de resultados.**

Existem serviços de suporte, que estão disponíveis para todos mas existe maior procura por parte dos estudantes tradicionais. Contudo, já se começa a verificar uma maior procura por parte de Alumni que voltam aos serviços para reorientação profissional.

**Appendix 12: Interview to Professor Ana Paula Africano of the school of Business and Economics of University of Porto (FEP) ((Vice-dean of FEP) and with Dr.<sup>a</sup> Marta Barbosa**

**This master thesis is about business schools' LLL strategies (learning opportunities throughout life) and the aim of this interview is to collect data concerning the LLL strategy of this school. Please describe the process (steps to the implementation of lifelong learning initiatives and/or strategy) and progress in terms of Lifelong Learning in the faculty over the last ten years. Indicate and explain the main decisions taken.**

The school, with the Bologna Process invested in the supply of masters of specialization, which are masters for students with professional experience. In this way, there was an internal motivation to invest in these programs of LLL, encouraged by the Bologna Process.

Simultaneously, the school invested in executive education, this is, continuing education, which does not give a degree. This education is provided by Porto Business School, which results from a partnership between FEP and companies. Porto Business School has a separate strategy from the one of FEP.

**Please identify the faculty's main goals regarding LLL, and what is the time target to accomplish them**

There is an investment in the offering of "cursos livres", this is, in courses that can be performed by people in the professional path, and who desire to enlarge their knowledge. These courses can be performed separately (ones from the others) according to the knowledge each person wants to deepen.

There is an objective to deepen the relationships with the Alumni with the aim of making LLL education more dynamic, and of increasing the partnerships with companies to foster the diffusion of initiatives.

**Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support**

**services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).**

The masters of specialization of FEP, which function in post-working hours, and the possibility to frequent separately courses of various masters, allow an education customized to each person's wants and professional needs. Investing in internationalization, at the masters' level (the offer is already stable). The supply is well segmented, both in pre-experience and post-experience. Now, the goal is to participate in international partnerships of quality. Students with experience, also have the opportunity to go abroad to study, however, this is more searched by students with no experience.

There are processes of accreditation and recognition of prior learning, in post-graduations and masters, but always giving great importance to the rigor, and so, are not common (concession of some ECTS in some very specific situations). There is also a system of "créditos livres" (free ECTS) which allow the possibility to make courses in other schools of University of Porto.

**Please identify the main challenges that occurred over the last ten years in the process and progress in terms of LLL and the way they were surpassed.**

In the last years there was a strategic reorientation, a recent orientation (in 2008) to change from a school of undergraduate to a school of masters. There is the objective that the number of master students surpasses, soon, the number of undergraduate students, existing an intake of 600 master students per year. Hence, it was a well-succeeded reorientation, proved by the number of candidates to a master. The number of candidates did not diminished with the increase in the fees of about 50% in two years.

The number of places offered in the masters is conditioned by Universidade do Porto, but the school can make proposals (to increase those numbers) which have been made and have been well accepted. There is total fulfillment of the places with many candidates left with no collocation.

**Please indicate which trends and factors have an influence in your faculty's strategy elaboration**

With more resources we would do more things. The funding restriction is always present. However, the school has a very strong drive to use accumulated resources in a proactive manner, this is, use already existing resources more efficiently. Reorganization and consolidation are two fundamental aspects occurring. 50% of the funding comes from the government and the other 50% come from school's revenues, from which a great part are student fees, and a small part are revenues from mainly applied research.

**Please indicate who are the main actors in decision-making and how is that decision-making process formulated**

The governance system is collegial (including docents, not docents, students and companies in a more indirect way). There is a great participation from Professors, namely from the scientific council in the clarification and segmentation of the offering, taking into consideration specific data collected concerning demand. For example, recently, a master was closed as a result of small demand.

The opinion of the students is taken into consideration through academic groups of students' association, given that the school has a close contact with those groups, some related to very specific areas, such as the FEP Finance Club.

All the masters have a commission composed by students which ends up having an influence in strategy elaboration. Companies do not participate directly, but are important stakeholders to whom the short to medium-term strategic plan is presented to obtain feedback. There is an integrated group of decision and management elements.

The decision process is structured, existing a great relevance of quantitative information (there are considered some important quantitative metrics)

**Is there the possibility and encouragement for the staff to engage in LLL activities?**

There is a plan of continuing education of human resources. The needs are identified and can be signaled either by the school or the worker. The school tries to collect information near the collaborators regarding areas of knowledge that workers believe should be improved.

**Please indicate how are your LLL initiatives communicated.**

The Alumni are highly important in the communication of initiatives, as well as, the newsletters. There is, in March, a masters market to attract students, even though it is more attractive to traditional students. Also, it is done through specialized communication means, such as social networks. The communication office works with each master's department to determine the best means of communication to contact with the professional of each area. In the masters of specialization there are students from very different backgrounds, such as law, engineering, psychology, sociology and international relations (being this proportion of approximately 50%). Some of them are working, others are trying to reorient to best fit in the job market.

**Please indicate which support services are provided to the target groups abovementioned and how effective are they in achieving their results**

There are support services that are available for every student, although there is a greater demand from traditional students. However, there has been an increase in the demand from the Alumni, who return to the services to search for professional reorientation.

**Appendix 13: Entrevista ao Professor José Reis da Faculdade de Economia da Universidade de Coimbra (Director da Faculdade de Economia da Universidade de Coimbra)**

**Esta tese de mestrado é sobre as estratégias de LLL (oportunidades de aprendizagem ao longo da vida) das faculdades de economia e gestão em Portugal e o objectivo desta entrevista é recolher informações relativamente à estratégia de LLL desta faculdade. Por favor descreva a missão e visão da escola em termos de LLL.**

O oferta de LLL é um aspecto premente para a faculdade, visto que nas sociedades de hoje o conhecimento rapidamente se desactualiza e portanto carece de reconstrução permanente. A universidade de hoje é diferente da universidade de há 40 anos atrás, quando existia falta de democracia no acesso e apenas ia à universidade a elite. Portanto a missão e visão da faculdade foram reconstruídas com base na criação de opções de especialização do conhecimento.

**Por favor descreva o processo (passos para a implementação de iniciativas e/ou estratégia de LLL) e progresso em termos de LLL na faculdade nos últimos 10 anos. Indique e explique as maiores decisões tomadas.**

O processo é o de especialização de conhecimentos dentro da faculdade, isto é, por interesse estritamente académico, o especialista tende a alargar horizontes levando à criação de quadros numa área e ao estabelecimento de uma rede de parcerias e vice-versa. Isto permite a criação da oferta que é depois alargada a vários públicos.

O principio da acreditação das competências é muito importante para a oferta de programas no domínio de LLL. Isto advém do novo modelo do conhecimento em que conhecimento não é exclusivo das faculdades. Existe acreditação de conhecimentos, por exemplo no caso de MBA. Também no caso de regresso à faculdade de licenciados antes de Bolonha para fazer mestrado. É um pouco processo de ensino “à la carte”.

**Por favor indique os maiores resultados em termos de LLL alcançados nos últimos 10 anos (alguns exemplos podem ser desenvolvimento de programas/cursos e serviços de suporte para lifelong learners, parcerias que promovam iniciativas de LLL, internacionalização, entre outros).**

Para responder às necessidades de públicos profissionais a faculdade oferece um MBA e cursos de especialização na área da economia social, da água, saúde, actividade autárquica, tribunais.

**Por favor indique os maiores desafios em termos de LLL que ocorreram nos últimos 10 anos e como foram ultrapassados.**

Os principais desafios são reorganizar a faculdade para receber público com origens, quer ao nível geográfico como ao nível de percurso profissional, diferentes. Mais difícil não é construir currículo académico mas sim adaptar a forma de ensinar e a organização. Um dos cursos mais emblemáticos para novos públicos decorreu do primeiro quadro de apoio comunitário, com parcial financiamento de fundos estruturais europeus, e foi um curso de especialização em negócio internacional. A faculdade teve de se adaptar para receber novos públicos.

**Por favor identifique os principais objectivos da faculdade em termos de LLL.**

O maior objectivo é ter perfeitamente encrostadas na missão e vida da faculdade as áreas que permitam intervir no domínio de LLL e a faculdade ser reconhecida a esse nível. Para além disso é um objectivo da faculdade ser capaz de fazer uma reavaliação constante da oferta relativamente a assuntos que se tornem prementes.

**Por favor explique como planeia atingir os objectivos acima mencionados.**

Antes de ter em conta limites económicos é importante ter em conta princípios base, isto é, é importante estar atento às necessidades sociais, da economia, de inovação. É também necessária uma actuação cooperativa, concertada com parceiros e um alargamento das áreas de actuação.

**Por favor indique quais são as maiores forças e fraquezas da faculdade em relação a financiamento e a forma de alavancar essas forças e de ultrapassar essas fraquezas.**

Embora o financiamento seja em parte dos estudantes existe uma percentagem significativa de estudantes com bolsas. O maior objectivo é demonstrar aos estudantes que a escolha de aprofundar os estudos é boa e que vai ter repercussões positivas no futuro e portanto vale a pena investir nisso. No entanto, dificuldades actuais em obter essas repercussões positivas vai levar a problemas de incentivos dos estudantes no futuro. Um exemplo disso que é que alunos já preferem mestrados a MBA.

**Por favor indique quem considera serem os principais intervenientes no processo de decisão e como este é formulado.**

A faculdade tem um director o que permite um processo de decisão mais colegial, uma vez que director ouve conselho científico , bem como vários outros stakeholders antes de decidir. O processo de decisão tem uma componente colegial muito grande, existindo participação de actores internos e externos, embora os internos tenham uma maior relevância. As opiniões exteriores, obtidas através das redes de parceiros, são tidas em conta mas de forma mais implícita. A faculdade tem a obrigação de pensar por si e não apenas responder a factores externos, embora estes sejam relevantes na definição da oferta. Embora vários stakeholders sejam ouvidos o processo é top-down na implementação da estratégia.

**Por favor indique as maiores tendências e factores que influenciam a elaboração da estratégia desta faculdade em termos de LLL.**

São influentes aspectos externos tais como a democratização do ensino, o facto do conhecimento ser essencialmente para as sociedades actuais, estarmos inseridos numa sociedade de inovação e a corrente lógica de concertação de diferentes actores. Existe uma grande influência externa.



**Quantas pessoas estão envolvidas no elaboração e oferta de iniciativas de LLL?**

Existe a escola de estudos avançados que tem uma estratégia integrada com a faculdade de economia

**Existe possibilidade e incentivo para que esses trabalhadores realizem actividades de LLL?**

O staff tem oportunidade de evolução em alguns casos, existindo articulação com departamento de Recursos Humanos da Faculdade.

**Por favor indique como são comunicadas as iniciativas de LLL.**

É dada muita importância à comunicação, que é feita desde as formas mais tradicionais, anúncios no jornal, até à forma mais instantânea do Facebook. Existe também uma pessoa que anda de carro por várias cidades a comunicar as iniciativas.

**Por favor indique quais os grupos de alunos mais interessantes para a faculdade e os motivos para tal.**

Estudantes tradicionais e não tradicionais têm igual importância para a faculdade. A oferta de pós-graduações e doutoramentos dão à faculdade uma imagem de ser mais complexa, mais densa, mais robusta. Investigação e produção académicas são necessárias para reconhecimento da faculdade. Mas são necessários estudantes de licenciatura para se conceber a faculdade em si.

**Por favor indique que serviços de suporte são prestados aos vários grupos de alunos e o quão efectivos são na obtenção de resultados.**

Serviços de proximidade, isto é, os serviços de interface comunicacional são importantes para a faculdade dos dias de hoje e desafio de mudar da faculdade de há 40 anos baseia-se nisso, alterações tanto em termos de conteúdo como em termos de serviços. Existe por exemplo um calendário diferenciado para estudantes estrangeiros.

**Por favor elabore uma análise SWOT da sua faculdade para determinar a capacidade desta em ser uma escola de LLL, baseando-se em todas as informações previamente discutidas.**

**Strengths:** Natureza interdisciplinar da faculdade com professores de diversas áreas.

**Weaknesses:** Obstáculos de adaptação da organização

**Opportunities:** Sociedade do conhecimento em que formações de especialização são valorizadas

**Threats:** Situação em que conhecimento passa a ser desvalorizado. Um exemplo que recente disto foi um despacho que define vagas pela empregabilidade. Orçamento ser mais pequeno também é relevantes mas não tanto.

**Appendix 14: Interview to Professor José Reis – Dean of the School of Economics of Universidade de Coimbra (Dean of School of economics of University of Coimbra)**

**This master thesis is about business schools' LLL strategies (learning opportunities throughout life) and the aim of this interview is to collect data concerning the LLL strategy of this school. Please describe the school's mission and vision concerning Lifelong Learning.**

The supply of LLL is a prominent aspect for the school, given that in today's societies the knowledge quickly becomes outdated and so needs constant actualization. The university of today is different from the university of 40 years ago, when there was a lack of democratic access, and only the elite went to university. So, the mission and vision of the school were reconstructed based on the possibility to create opportunities of knowledge specialization.

**Please describe the process (steps to the implementation of lifelong learning initiatives and/or strategy) and progress in terms of Lifelong Learning in the school over the last ten years. Indicate and explain the main decisions taken.**

The process is the one of specialization of knowledge inside the school, this is, due to academic interest the specialist tends to enlarge horizons leading to the creation of staff specialized in a given field and to the establishment of a network of partnerships, and vice-versa. This allows the creation of the supply that is then enlarged to various targets.

The principle of accreditation of competences is very important to the supply of programs in the field of LLL. This comes from the new model of knowledge, in which knowledge is not exclusive to schools. There is accreditation of knowledge in, for example, the case of MBA. Also when the people with a degree from before Bologna return to school to do a master. It is a little like education "à la carte".

**Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support**

**services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).**

To answer to the needs of different professional targets, the school offers an MBA, and courses of specialization in the areas of economics and management related to the fields of social economics, water, health, courts and political activity.

**Please identify the main challenges that occurred over the last ten years in the process and progress in terms of LLL and the way they were surpassed.**

The main challenges are the school's reorganization to receive a target with diverse origins, geographic and professional. The most difficult task is not to build an academic curriculum, but to adapt the way of teaching and organizing. One of the most emblematic degree to new targets occurred at the time of the first EC support program, with the partial funding from European structural funds, and it was a degree of specialization in international business. The school had to adapt to receive those new students.

**Please identify the faculty's main goals regarding LLL.**

The biggest goal is to have perfectly integrated in the mission and vision of the school, the areas that permit to intervene in the LLL area, and the school to be recognized at that level. Besides, it is an objective of the school to be capable of constant reevaluating the offer, relatively to more pressing issues.

**Please explain how you plan to reach the goals referred regarding Lifelong Learning.**

Before taking into account economic limits, it is important to consider principles of base, this is, it is important to be attentive to social, economical, and innovation needs. It is also needed a cooperative actuation, accorded with partners, as well as, an enlargement of the fields of actuation.

**Please explain what are the school's main strengths and weaknesses in terms of funding and the way to enhance the strengths and to overcome the weaknesses.**

Although the financing is in part provided by the students, there is a great percentage of students with scholarships. The biggest objective is to demonstrate students that the choice to deepen knowledge is a good one, which will have positive repercussions in their future, and so it is worth to invest in it.

However, the current difficulties in obtaining those positive repercussions, is going to lead to a problem of incentives of students in the future. An example of that is that students already prefer masters to MBAs.

**Please indicate who are the main actors in decision-making and how is that decision-making process formulated.**

The school has a dean, which allows a more collegial decision process, once the dean listens to the scientific council, as well as, other stakeholders, before deciding. The decision process has a great collegial component, existing the participation of internal and external actors, even though the internal actors have a bigger relevance. The external opinions, obtained through a network of partnerships, are taken into consideration, but in a more implicit way. The school has the obligation to think for itself, and not only respond to external factors, although these are relevant in the definition of the offering. Although, the various stakeholders are listened to, the process is top-down in the implementation of the strategy.

**Please indicate which trends and factors have an influence in your school's strategy elaboration.**

The external factors, as the education democratization, the fact that the knowledge is essential to nowadays societies, the fact that we are inserted in a knowledge society, and the current logic of cooperation of the different actors are influential. There is a great external influence.

**Please indicate if there is any staff that is LLL staff.**

There is the school of advanced studies that works in close collaboration of the economics and business school for that.

**Please indicate if the staff is also encouraged to engage in LLL.**

Staff has growth opportunities in some cases, existing an articulation with the department of human resources.

**Please indicate how are your LLL initiatives communicated.**

Communication, which is considered very relevant, is performed in the most traditional means, such as newspapers, and in the most instantaneous ones, such as Facebook. There is also a person that visits some cities to communicate the initiatives.

**Please explain which target groups are the most interesting for your school and the reasons for that.**

Traditional and non-traditional students have equal importance to the school. The offer of post-graduations and PhDs transmit a more complex, dense and robust image of the school. Research and academic production are necessary to school's recognition. However, traditional students are required to conceive the image of a school in itself.

**Please indicate which support services are provided to the target groups abovementioned and how effective are they in achieving their results.**

Support services, this is, the communication services are important for the school of today; and the challenge to change the school of 40 years ago is based on that, changes not only in terms of content, but also in terms of support services. There is for example a different calendar to foreign students to facilitate their integration.

**Please elaborate a SWOT analysis for your school to determine the institution's ability to be a Lifelong Learning university, based on all the information previously defined.**

**Strengths:** Interdisciplinary nature of the school with Professors from various backgrounds

**Weaknesses:** Obstacles to the adaptation of the organization

**Opportunities:** Knowledge society in which education for specialization is valued

**Threats:** Situation in which the knowledge starts to be undervalued. A recent example of this was a dispatch, which defines the places in the degrees according to the employability of them. Smaller budget is relevant but not so much.

**Appendix 15: Entrevista ao Professor Mário Caldeira do ISEG (vice-presidente do ISEG)**

**Esta tese de mestrado é sobre as estratégias de LLL (oportunidades de aprendizagem ao longo da vida) das faculdades de economia e gestão em Portugal e o objectivo desta entrevista é recolher informações relativamente à estratégia de LLL desta faculdade. Por favor descreva a missão e visão da escola em termos de LLL.**

A estratégia de Lifelong Learning da faculdade está incluída na estratégia geral da escola. A escola pretende proporcionar formação para pessoas ao longo da vida, quer mais académica, quer mais profissionalizante.

**Por favor identifique os principais objectivos da faculdade em termos de LLL.**

O maior objectivo é que pessoas tenham relação ao longo de toda a vida com o ISEG. Assim sendo o ISEG procura estabelecer uma relação duradoura com os alunos.

**Por favor descreva o processo (passos para a implementação de iniciativas e/ou estratégia de LLL) e progresso em termos de LLL na faculdade nos últimos 10 anos. Indique e explique as maiores decisões tomadas.**

Existe neste momento uma sensibilização por parte da escola para a necessidade de formação ao longo da vida. No passado não existia.

A maior parte dos mestrados é para alunos sem experiência mas existem programas para alunos com experiência. E por exemplo, pós graduações dão equivalência a parte dos mestrados.

**Por favor indique os maiores resultados em termos de LLL alcançados nos últimos 10 anos (alguns exemplos podem ser desenvolvimento de programas/cursos e serviços de suporte para lifelong learners, parcerias que promovam iniciativas de LLL, internacionalização, entre outros).**



Por iniciativa própria são oferecidos diversos programas: licenciaturas, mestrados, doutoramentos, pós-doutoramentos, Golden Master... Este último destina-se a pessoas aposentadas que queiram estar actualizadas ou gestores de topo que querem estar informados. Algumas destas formações são mais recentes, outras mais antigas.

**Por favor indique os maiores desafios em termos de LLL que ocorreram nos últimos 10 anos e como foram ultrapassados.**

Ter informação sobre diferentes alunos desde licenciatura até formação executiva. Existe um processo de tracking dos alunos, através de um sistema de CRM, que permite saber historial integrado dos alunos.

**Por favor indique as maiores tendências e factores que influenciam a elaboração da estratégia desta faculdade em termos de LLL.**

Não existe grande influência de factores externos à faculdade. Os factores internos são os mais relevantes, como por exemplo a motivação existente na organização).

**Por favor indique quem considera serem os principais intervenientes no processo de decisão e como este é formulado.**

O processo de decisão é top-down, com uma componente formal e uma componente informal.

**Quantas pessoas estão envolvidas na elaboração e oferta de iniciativas de LLL?  
Existe possibilidade e incentivo para que esses trabalhadores realizem actividades de LLL?**

Não existe um departamento com essa definição mas existem funções relacionadas com a área. O staff é encorajado a entrar em actividades de LLL.

**Quais as parcerias essenciais para a oferta de iniciativas de LLL?**

Parcerias com outras escolas, empresas e a rede Alumni são relevantes.

**Por favor indique como são comunicadas as iniciativas de LLL.**

A comunicação é muito diversificada, incluindo vários mecanismos tradicionais.

**Por favor indique quais os grupos de alunos mais interessantes para a faculdade e os motivos para tal.**

Ambos os grupos de alunos são igualmente importantes para a faculdade.

**Por favor indique que serviços de suporte são prestados aos vários grupos de alunos e o quão efectivos são na obtenção de resultados.**

Existem serviços de suporte para ambos os grupos.

**Appendix 16: Interview to Professor Mário Caldeira (Vice-President of ISEG)**

**This master thesis is about business schools' LLL strategies (learning opportunities throughout life) and the aim of this interview is to collect data concerning the LLL strategy of this school. Please describe the school's vision and mission concerning Lifelong Learning.**

The Lifelong Learning strategy of the school is included in its overall strategy.

The school aims to provide education opportunities for people throughout life, either more academic experiences, or more professional ones.

**Please identify the school's main goals regarding LLL.**

The major objective is that people have a relationship throughout life with ISEG, and in this way, the school tries to establish a last-longing relationship with the students.

**Please describe the process (steps to the implementation of lifelong learning initiatives and/or strategy) and progress in terms of Lifelong Learning in the faculty over the last ten years. Indicate and explain the main decisions taken.**

Nowadays the school is aware of the need to provide education initiatives for all span of people's lives, which did not exist in the past. Even though the majority of the masters is still for students without experience, there are programs for students with experience. And, for example, post-graduations have equivalence to part of the masters.

**Please explain the main achievements in LLL over the last ten years (examples of main achievements might be development of programs/courses and support services suitable for lifelong learners, partnerships to foster LLL initiatives, increasing internationalization, among others).**

By own initiative there are offered a diversity of programs: undergraduates, masters, PhDs, post-docs, Golden Master,.. This last one is destined to people, which are

retired and want to keep actualized or top managers who want their knowledge to be updated. Some of these programs are more recent, others are older.

**Please identify the main challenges that occurred over the last ten years in the process and progress in terms of LLL and the way they were surpassed.**

Gather information about students from undergraduate till executive education about their educational path. There is a process for tracking students, through a CRM system, that permits to have an integrated history of students.

**Please indicate which trends and factors have an influence in your school's strategy elaboration.**

There is not a great influence from factors external to the school. Internal factors, such as internal motivation, are more relevant.

**Please indicate who are the main actors in decision-making and how is that decision-making process formulated.**

The decision process is top-down and has both an informal component and a formal one.

**Please indicate if there is any staff that is LLL staff and in case of a positive answer please indicate their functions and positions.**

There is no department with that definition but there is staff with functions related to that area. Staff is encouraged to engage in LLL activities.

**Which partnerships are essential to the performance of Lifelong Learning initiatives?**

Partnerships with other schools, companies and the Alumni network are all relevant.

**Please indicate how are your LLL initiatives communicated.**

The communication means are highly diversified, and include several traditional mechanisms.

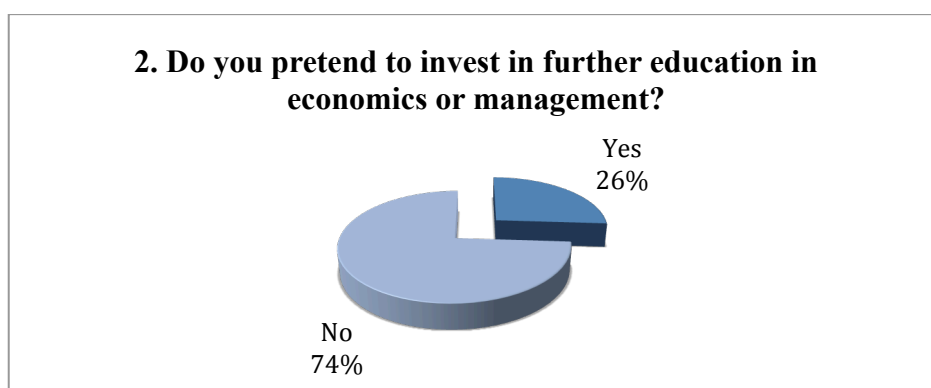
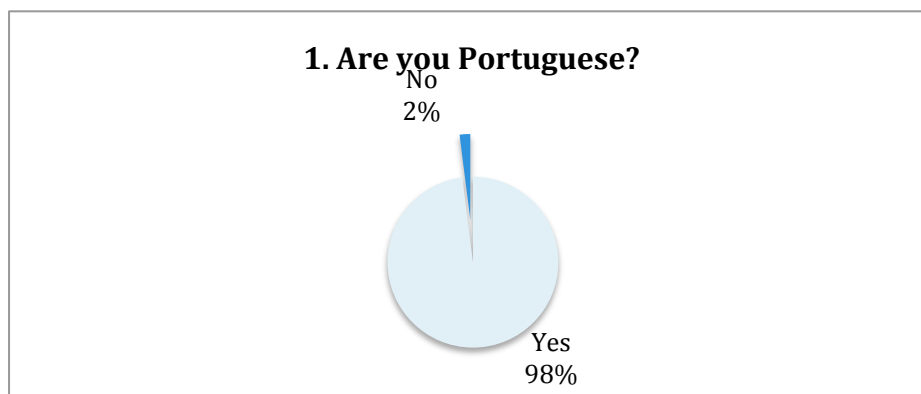
**Please explain which target groups are the most interesting for your school and the reasons for that.**

Both target groups are equally relevant to the school.

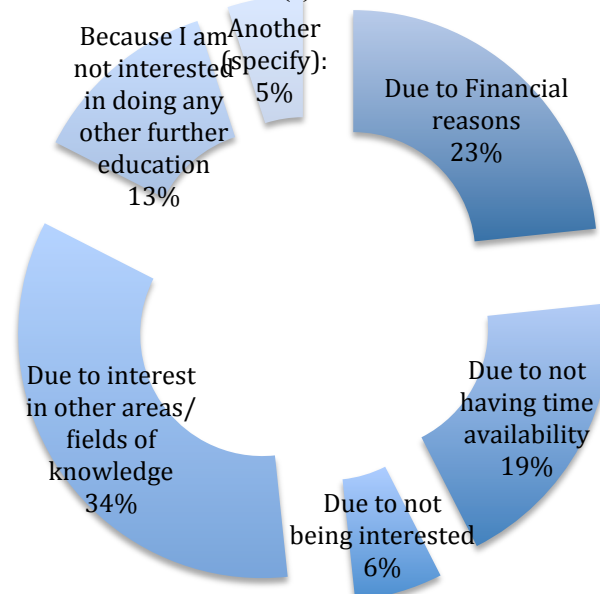
**Please indicate which support services are provided to the target groups abovementioned and how effective are they in achieving their results.**

There are support services for both groups.

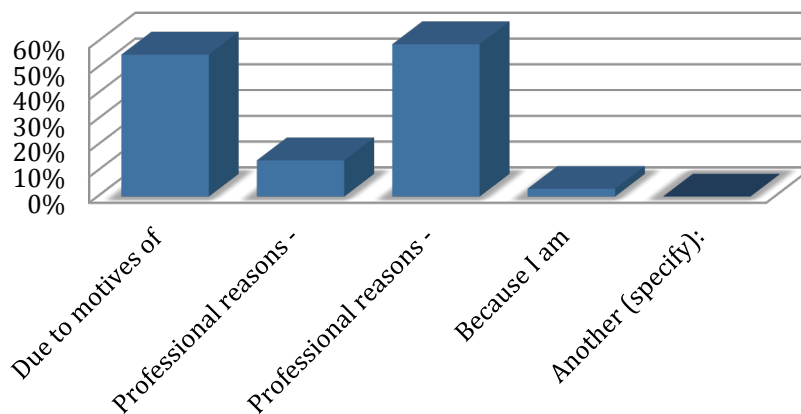
## Appendix 17: Survey Results



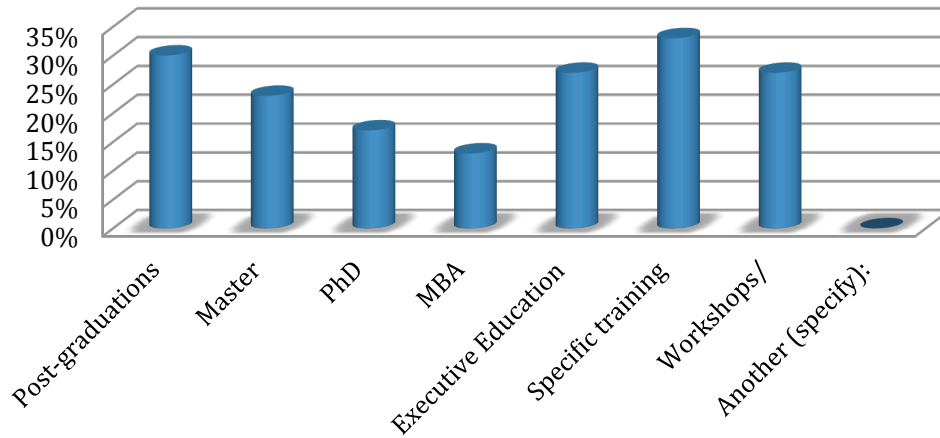
**3. If you DO NOT PRETEND to invest in further education in economics and management please indicate the reason(s):**



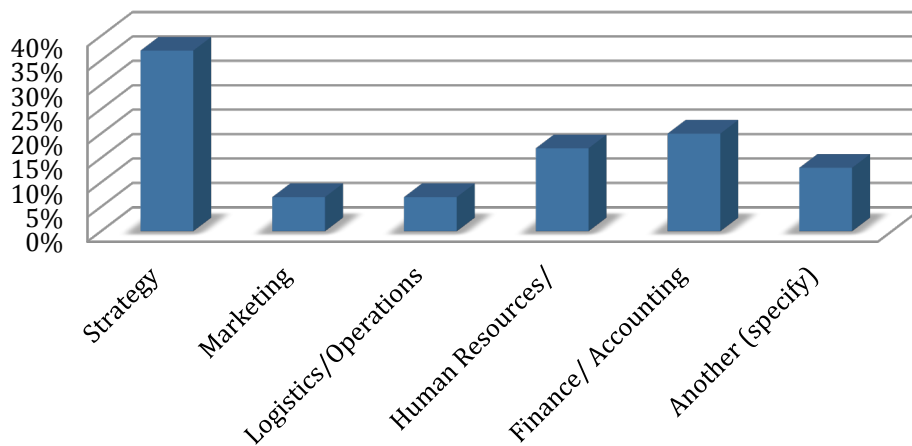
**4. If you DO pretend to invest in further education in economics and management please indicate the reason(s):**



**5. If you DO pretend to invest in further education in economics and management please indicate in which type of education:**

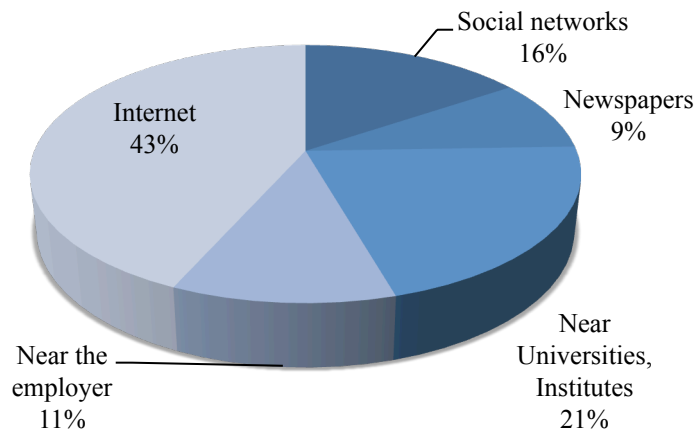


**6. If you DO pretend to invest in further education in economics and management please indicate the area:**



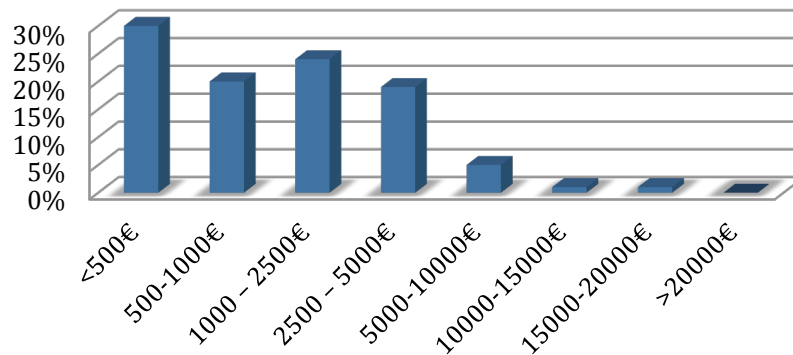


**7. How do you search for more information concerning further education opportunities?**

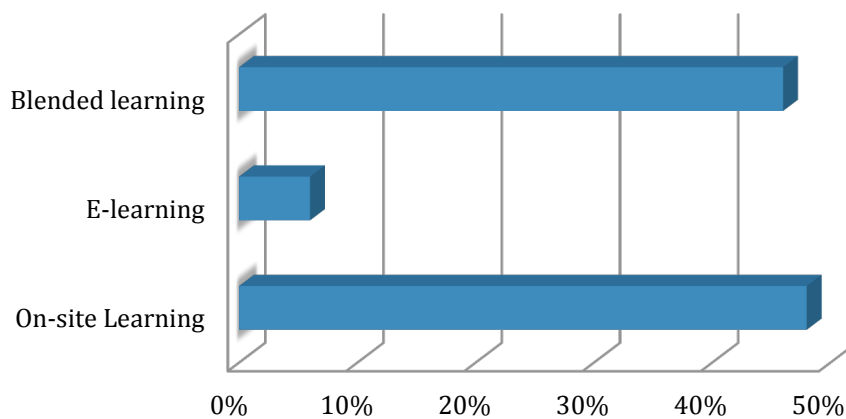


Question	Totally Disagree	Disagree	Neither agree or disagree	Agree	Totally Agree
Good relation quality/price	4	9	39	24	6
The current offerings could be more diversified	1	5	30	39	7
The communication of the offerings should be more visible	0	3	15	48	16
The current offerings are still directed to people with few or no experience	2	10	32	32	6

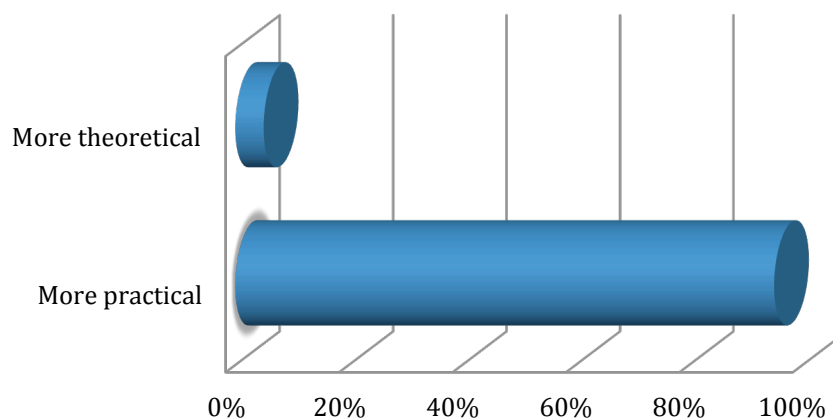
**9. How much do you consider to be the right price to pay for the further education you desire?**

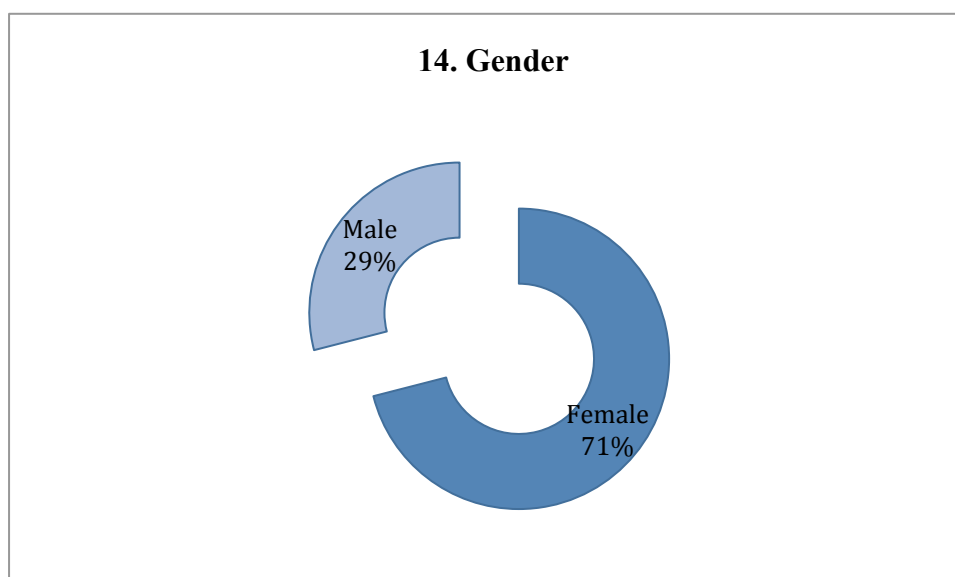
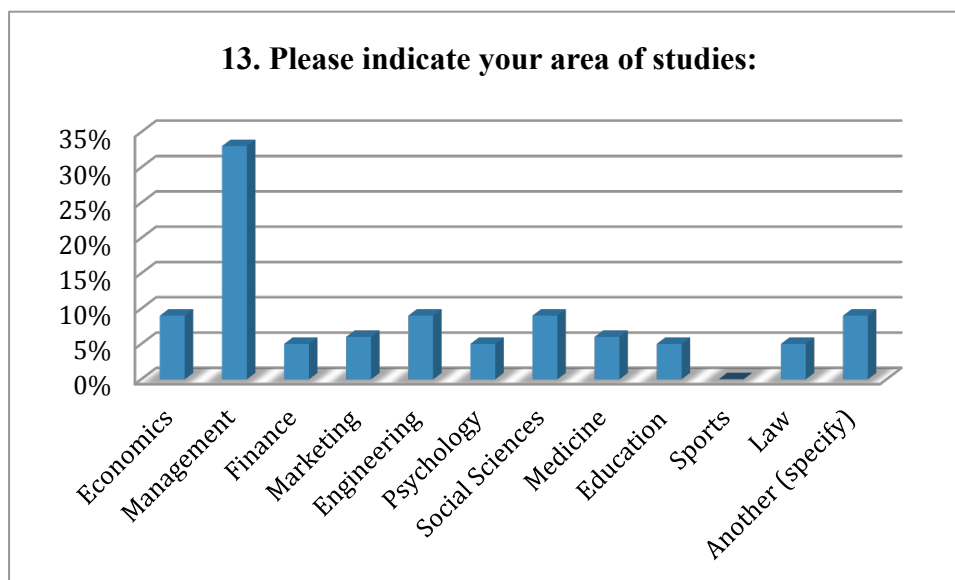
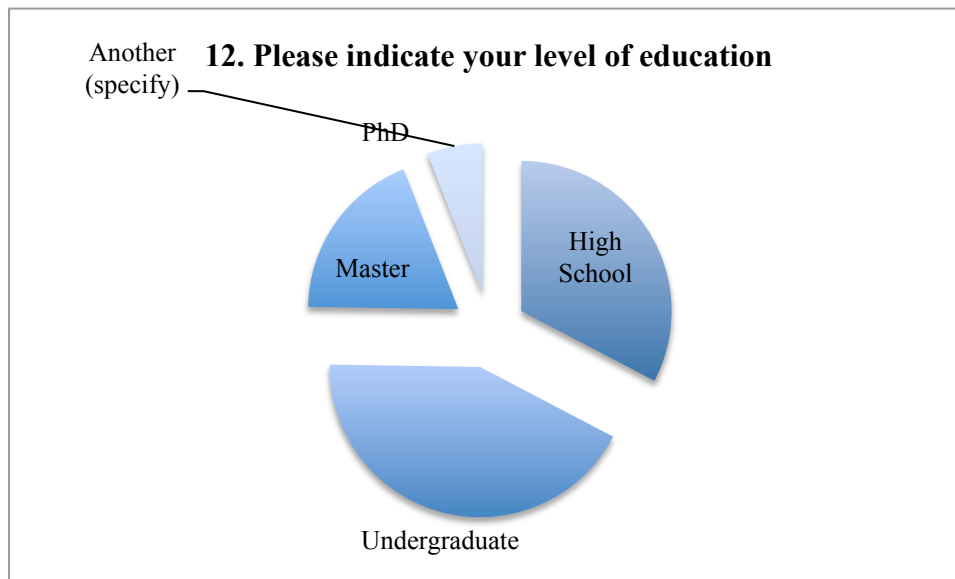


**10. Which teaching model do you consider the most adequate?**

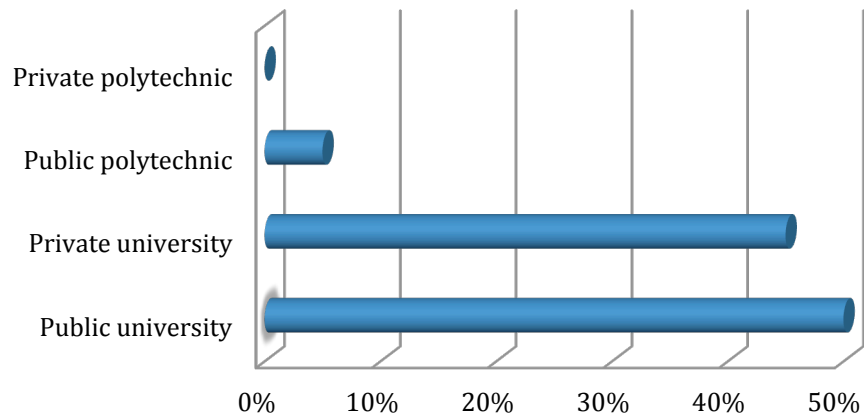


**11. Which teaching method do you consider the most adequate?**





**15. Please indicate the type of university where you did your last studies:**



**16. Age Group**

